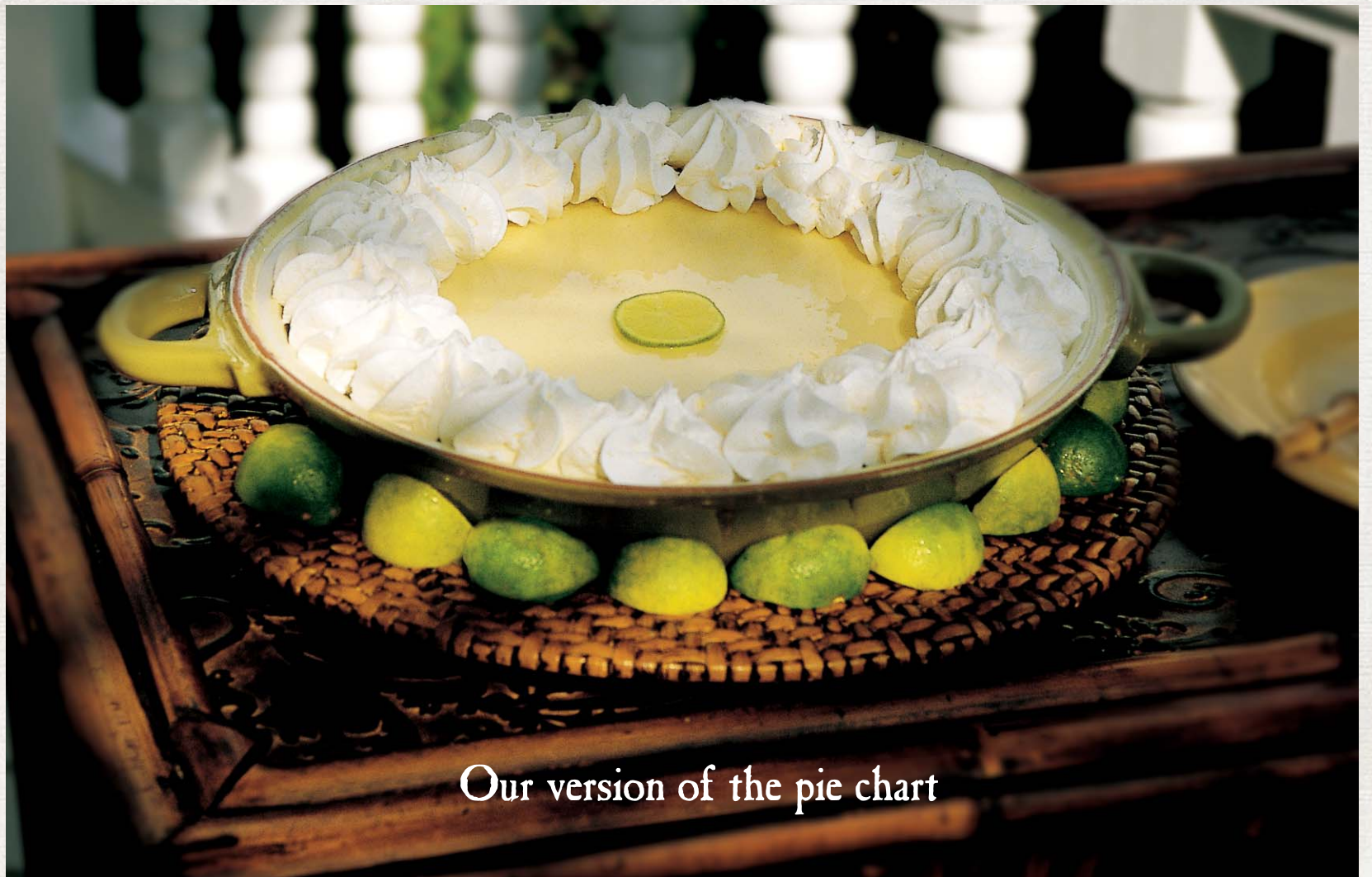


MARKETING PLAN 2005-2006



Our version of the pie chart



THE FLORIDA KEYS & KEY WEST
MONROE COUNTY TOURIST DEVELOPMENT COUNCIL
Come as you are®

Table of Contents

Section One: The Mission of the TDC

I.	Vision Statement	A-2
II.	Purpose of Plan	A-3

Section Two: Situation Analysis

I.	Product Analysis.....	B-1
II.	Position Analysis	C-1
III.	Prospect Analysis	D-1
IV.	Promotional Analysis.....	E-1

Section Three: Program Planning

I.	Program Development	
i.	Goals	F-1
ii.	Priorities.....	G-1
iii.	Resources.....	H-1
II.	Marketing Strategies and Implementation	
i.	Advertising.....	I-1
ii.	Sales.....	J-1
iii.	Public Relations	K-1
iv.	Film Commission	L-1
v.	Research	M-1

Section Four: Evaluation	N-1
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Section One: The Mission of the Tourist Development Council

I. Vision Statement

The mission of the Monroe County Tourist Development Council is to set an overall direction for the Monroe County tourism marketing effort in a manner that will assure long-term sustained growth in tourism revenues while also guaranteeing the sustainability and improvement of our product, including both our man-made and natural resources, and improvements to the quality of life of our residents.

//. Purpose of the Plan

The nature of the marketplace dictates that a comprehensive marketing approach is needed by the Monroe County Tourist Development Council if it is to remain competitive and to have a lasting impact on the development of tourism for the Florida Keys. Our program must also balance sustainable tourism with improvements to the quality of life of our residents.

The TDC must have a clear direction and understanding of marketing, market segments and market techniques to be effective. The plan must focus on its present situation, goals and objectives, resources, program strategies and evaluation criteria.

The following are general guidelines for the planning and development of the Monroe County Tourist Development Council's marketing plan as evidenced, in the Table of Contents. Each section is further compartmentalized to address multiple areas.

- a. Review of the TDC's mission.
- b. Analysis of the current situation.
- c. Marketing program goals and objectives.
- d. Marketing division strategies and implementation.
- e. Evaluation criteria.

The Monroe County Tourist Development Council's 2004-2005 Marketing Plan sets the guidelines on how the revenues of the three penny (3%) bed tax (Florida Statutes 125.0104) on visitors will be allocated for the marketing of the Florida Keys and Key West.

Two penny revenue is broken down in the following manner: 5% state mandated reserve (Florida Statutes 129.01); 7% of the net revenue may be used for program administration; 65% of the net revenue is utilized for generic promotion and advertising; the remaining 35% of the net is used for funding events, public relations and consumer mail fulfillment.

The third penny revenue is broken down in the following manner: 5% state mandated reserve (F.S. 129.01); 3% of net revenue may be used for program administration. The remaining third penny revenues may be allocated within the following five categories: visitor information services; capital projects; special events and district specific advertising and promotion. District Advisory Committees representing the five districts within Monroe County make recommendations for allocation of the third penny.

Clearly the marketing plan must be evolutionary, with adjustments and modifications made to strategies during the year.

Section Two: Situation Analysis

Descriptive profile of the Florida Keys

I. Product Analysis

- The Florida Keys is the premier get-away destination located at the southernmost tip of Florida and the continental United States.
- Tourism is the Florida Keys main industry - with a current permanent population of around 80,000. The Keys business sector and residents are dependent on the economic contribution of the day and overnight visitors to the Keys.
- The Florida Keys is easily accessible by land transportation. The primary mode of travel for overnight visitors to the Keys is by auto or other form of land-based transport. (89%)
- The Florida Keys are accessible by air. (10%)
 1. Key West International Airport is served by American Eagle, Gulfstream (Continental, TWA and United connections), Delta, US Airways, and Cape Air, Florida Coastal Airlines. Special charter service is available at Key West International Airport.
 2. Florida Keys/Marathon Airport also services the Florida Keys. This full service facility can handle private, commercial and chartered flights.
 3. Miami International Airport is the second largest international airport in the United States. The Fort Lauderdale/Hollywood International Airport serves millions of travelers from all over the world. Domestic and international travelers to the Keys can fly into these airports and travel by car or bus into the Florida Keys.
- The City of Key West receives approximately one million cruiseship visitors a year.
- Total commercial flight capacity at Key West International Airport is approximately 150 daily. Key West Airport annual passenger capacity is 600,000 arrivals/departures. Marathon Airport, at this time a general aviation airport, has passenger capacity of 250,000.
- Ground transportation to and from the Florida Keys is available by Greyhound (scheduled in line transportation from Miami International Airport through to Key West); shuttle services; major car rental agencies; and limousine services. Local transportation by taxi and shuttles; and Key West offers public buses, unique trolleys and a sightseeing train.
- There are ferry services from the west coast (Fort Myers/Naples) of Florida that have daily departures and convenient downtown arrivals into Key West. There is also a ferry service from Islamorada in addition to visitors arriving on their own boats. (1%)

I. Product Analysis - continued...

- The Florida Keys hosts a variety of accommodations. Accommodations in the Keys for vacationers or business travelers include full service hotels, motels, condominiums, guest houses (inns), beach cottages, licensed seasonal home rentals and house boats. The TDC lists nearly 16,000 rental units throughout the Keys.
- The Florida Keys camping and recreational facilities are plentiful.
- There are approximately three thousand licensed camping sites in Monroe County.

Florida Park Service:

Bahia Honda State Park
Curry Hammock State Park
Fort Zachary Taylor State Historic Site
Indian Key State Historic Site
John Pennekamp Coral Reef State Park
Key Largo Hammock State Botanical Site
Lignumvitae Key State Botanical Site
Long Key State Recreation Area
Shell Key State Preserve (no public access)
Windley Key State Geological Site

National Parks:

Everglades National Park
Fort Jefferson National Monument (Dry Tortugas)

National Wildlife Refuges:

Crocodile Lake National Wildlife Refuge (no public access)
Great White Heron National Wildlife Refuge
Key West National Wildlife Refuge
National Key Deer Refuge

Aquatic Preserves:

Biscayne Bay-Card Sound Aquatic Preserve
Coupon Bight Aquatic Preserve
Dry Tortugas Aquatic Preserve
Lignumvitae Key Aquatic Preserve
San Pedro Underwater Archaeological Preserve

National Marine Sanctuary:

Florida Keys National Marine Sanctuary

I. Product Analysis – continued

- The Keys boasts a variety of restaurants providing the visitor with a myriad of dining pleasures including seafood specialties; ethnic cuisine; local delights; continental and fine dining.
- Night life in the Keys offers diverse entertainment. Local and internationally recognized talent adds to the unique experience of the Keys.
- The Florida Keys offers the best fishing opportunities anywhere in the world with over 500 I.G.F.A. world records. Private charter trips are available throughout the Florida Keys in Florida Bay, Atlantic Ocean and the Gulf of Mexico for either back country, flats fishing to deep sea/offshore fishing on a daily basis and by reservations. Visitors can also enjoy wading, pier and bridge fishing.
- The Florida Keys hosts the only living coral reef in North America. Exploring the living reefs of the Looe Key, named after the H.M.S. Looe which ran aground here in 1744, the John Pennekamp State Park and the National Marine Sanctuary together with the many artificial reefs along the Keys provides the ideal snorkeling or diving experience.
- The cultural heritage of the Florida Keys offer visitors an array of live theater, arts & craft festivals and is home of many noted authors, musicians and painters.
- The Florida Keys has many attractions to offer. The primary attractions for the visitor to the Keys are its natural resources, year-round temperate climate, parks, and water activities including boating, fishing, snorkeling and diving. History plays an important role in the Keys experience. Historical homes, lighthouses, museums and monuments weave an intriguing historical adventure of pirates, wreckers, writers, poets and artists throughout the Florida Keys. Sightseeing ranks the highest of visitor activities.

II. Position Analysis

In analyzing the Florida Keys' product for leisure tourism and meeting business, it is important to identify the current positive aspects of the destination as well as considering those areas which may, by improvement, enhance the Keys' position in the global marketplace.

1. Strengths and assets
 - temperate year-round climate - warm winters
 - friendly, 'laid-back' image
 - great natural resources to promote ecotourism
 - historical and cultural heritage
 - various disciplines of the arts
 - many sightseeing attractions
 - safe environment
 - best fishing resources in the world
 - number one dive destination
 - unique RV camping locations
 - excellent dining available
 - only living reef in North America
 - unique accommodations
 - southernmost point of the continental US
 - a major wedding & honeymoon destination
 - close relationship of two large metro airports of Miami & Fort Lauderdale
2. Weaknesses and liabilities
 - lack of consistency in room quality
 - lack of direct flights from principal markets
 - negative perception of seasonal storms
 - lack of traditional sandy beaches
 - traffic congestion
 - lack of convention and meeting facilities
 - perception of over crowding in Key West from cruiseships
 - lack of commercial airline service to Marathon Airport
 - changes to availability of transient accommodations
 - reoccurring water quality issues
 - lack of stable service personnel resources
 - employment turnover rate
 - lack of affordable housing

II. Position Analysis, continued...

Our market competition are the destinations that compete with us in many of the tourism markets throughout the world. The markets include domestic winter-time retreats, island get-a-ways, fishing and diving locations, gay/lesbian travel, ecotourism, soft adventure, cultural tourism, in-state vacation travel and other specialty markets. We must compare our competition's coverage, budget and demographics to our own and how it relates to industry results.

Based on competitive analysis, techniques such as trend analysis, market share analysis, market buildup and test marketing are broadly employed to help position ourselves within the marketplace.

Our position as an ideal cultural and historical tourism destination, sets the background for a marketing campaign to highlight the unique character and attractions of the Florida Keys. Cultural and historical tourism is travel directed towards experiencing the arts, heritage, history, foods, ethnicity, architecture and other things including the natural environment that contributes to the special character of a place. We intend to continue to bring this kind of travel experience to the forefront of our campaign.

Ecotourism will also be at the forefront of our marketing program. Nature-based tourism is ideal for the Keys in that we have wonderful environmental resources. We must promote to responsible visitors who will understand to enjoy and protect our surroundings.

We will develop more diversity in multicultural marketing communications. Culturally relevant communications build relationships, and relationships build brand awareness. Research over the past few decades has consistently shown the multicultural consumers respond best to messages and images that reflect an insight into their culture and the unique ways they perceive the product or service. We must focus on developing diverse marketing promotions and programs where each group is recognized as an integral part of the overall marketing effort.

Geotourism is a term that places our marketing position in a more updated and desirable position to the marketplace. Geo-tourism is about attracting visitors who understand about preserving a destination's environment, by helping to sustain or even enhance the geographical character of the place visited, including the well-being or quality of life of its residents. More travelers are wanting to not only visit or sightsee, but to learn more about the history and culture of the area and it's people. Travelers are learning to be ready to act to preserve and protect the natural aspects of the destination. We will need to better understand the psychographics of these potential visitors, to see what interests and motivates these individuals to select destinations associated with environmental sustainability.

With the globalization of travel, the Florida Keys are a great destination for international tourism. International visitors have a tendency to stay longer while visiting. Based upon the country's preference of vacation periods, we are able to strategically market international travel throughout the year.

The Keys has developed a reputation as a great weddings/honeymoon destination. Although there are plenty of things to do in the Keys, we are also ideal for those who just want to enjoy other's company with a minimum of distractions.

Alternative transportation is an essential point of our marketing to help relieve the traffic problems. There will be more focus on regional jet air and the expanded ferry service, and making visitors aware, that once they are in the Keys, there are a number of alternative means of transportation, which would include shuttles, public busses, taxis, pedi-cabs, tour trains, trolleys, bicycles and of course, sightseeing on foot.

With the potential visitor or consumer looking for value in their purchases, we must position our marketing approach to strategies to increase customer satisfaction for their visit to the Keys. We will focus on Customer Relationship Management (CRM) to give the visitor a good experience while planning their travel.

Electronic Marketing/Internet/Website

Electronic marketing has become one of the most effective marketing tools available to destination marketing. Our website is our most important marketing tool in the promotion and service to the potential visitor. This being the case, then getting the potential visitor to the website is the most important call to action. The main sources for users in finding the website is through mainstream advertising such as print and broadcast ads, and through Internet marketing. All print and broadcast advertising includes our website address. Internet advertising includes some banner ads, but most of our marketing will be search driven by search engines or key search words, and direct email/promotions. Search engine submissions requires research to get to the best positions. Search words require picking the best terms that relate to our destination's promotional positioning.

We will also continue to focus on direct electronic marketing such as e-mail blasts, newsletters and electronic magazines (e-zines). E-mail marketing will be to the travel trade industry and to opt-in consumers. E-newsletters and e-zines will be developed by the staff and our agencies of record to be also mailed to opt-in users. We will also buy into these e-promotions through Visit Florida and other media placement outlets.

Electronic links from other promotional sites to our website will be an important marketing medium. Within our e-newsletters, e-zines, and direct e-mail promotions, we will offer e-co-ops to the industry that will allow link-throughs to our partner's website.

The Internet and access to our website is the perfect medium to all the market segments, demographics and geographics of the potential visitor. The website provides the desired information quickly and easily to anyone, anywhere in the world. International marketing is no longer an option, but a strategic imperative.

The marketing of our site is very important to the overall plan. We must think of our site as a product, and the content as the product lines.

Website service after the potential visitor finds the site becomes the final and most important stage in determining a visit. We must design a site that provides the user with the kind of service comparable to the corner market in one's neighborhood – simple, precise and personable. As our site expands with more destination information, users will not have the patience to scan through four or five links just to get to the right area of the site. The site needs to make users feel welcome and guide them to the needed information for a decision making step. After the decision has been made, the site must have the ability to make the sale directly from the site.

Instead of merely broadcasting to a massive and anonymous audience, a website can narrow cast to meet the specialized needs of each incoming user. The more specific the audience definition is, the more interesting, and useful the site becomes to its visitors, which, in turn, allows for more efficient and direct marketing. The site will become our main sources of Customer Relationship Management (CRM) program. Relationship marketing is also about keeping existing customers happy, along with attracting new customers. Content is a strong driver for encouraging repeat visits by users, particularly when it is fresh, timely and gives the user a reason to visit regularly.

One of the most important elements of e-marketing is that we will be able to track Internet marketing to our site. You are able to see how the visitor came to the site, either by banner, click-through, search, site address or by link.

Customer Relationship Management

Customer Relationship Management (CRM) refers to strategies to increase customer satisfaction by using a one-on-one approach to customers even in a global market by managing, interaction and tracking between customer and the industry.

The first role in CRM is that the potential visitor or customer should be in charge of his or her experience. We must do everything we can to make the experience more personal and to give a quick response to their needs. The response and interaction needs to be direct.

To use this one-on-one approach in a global marketing, we will be looking to use more electronic marketing in the areas of (1) database information; (2) e-mail blasts and newsletters; and (3) our website.

Data base information is collected from the travel trade industry such as travel agents, tour operators and meeting planners. Consumer data base information is collected from opt-in e-mail requests to our site, or opt-in requests to other travel related sites wanting information.

E-mail has become one of the most inexpensive means of direct mail possible. After receiving permission (opt-in e-mail), we will send out electronic marketing messages to the trade industry and directly to consumers through e-mail blasts or newsletter.

Our website is our main source of CRM. The website can narrow cast to meet the specialized needs of each incoming user. The web user can interact by receiving destination information within electronic brochures, live cams, maps, videos, multi-lingual assistance, updated news releases, opt-in mail and on-line reservations.

Other CRM direct marketing includes direct mail advertising with co-op opportunities so that the consumer can interact directly with the lodging property or other business partners. Also, we will continue to interact with the consumer through intercept research programs such as the Visitor Profile Study and our VIS program.

Our new technical ways to retrieve and send information on travel and our ability to communicate to the consumer through CRM will continue to define the new economy and build business one traveler at a time.

III. Prospect Analysis

The Monroe County Tourist Development Council is charged with the responsibility of identifying target markets which, primarily based on research, have generated the highest return for investment for the destination. Strategic programs implemented by the TDC to target these markets are outlined in this document from Section Three: Marketing Strategies and Implementation.

1. **Domestic Markets**

- **Primary**

- Florida (Dade, Broward, Palm Beach, Pinellas, Hillsborough, Lee, Collier, Orange)
- New York, Illinois, Pennsylvania, Michigan, Ohio, New Jersey, Georgia, Texas, Indiana, North Carolina, Massachusetts

- **Secondary**

- Connecticut, Virginia, Minnesota, South Carolina, Alabama, Wisconsin, California, Missouri, Tennessee, Maryland

2. **International Markets**

- **Primary**

- Germany, United Kingdom, Canada

- **Secondary**

- Italy, Netherlands, Switzerland, Austria, Japan, Scandinavian countries, and South American countries of Argentina, Brazil and Chile, France

3. **Specialty Markets**

- A. Historic/Cultural
- B. Soft-Adventure
- C. Ecotourism
- D. Geotourism
- E. Fishing
- F. Diving
- G. Gay/Lesbian
- H. Mature
- I. Weddings/Honeymoon
- J. Boating
- K. Multi-Ethnic Markets
- L. Family Travel

- 4. **Primary Market Segments**
 - A. Leisure Travelers
 - B. Special Event Travelers
 - C. Travel/Trade Industry
 - 1. travel agents
 - 2. tour operators
 - 3. wholesalers
 - 4. travel writers
 - 5. motor coach operators
 - 6. airlines
 - D. Gay/Lesbian Visitors
 - E. Vacationing Families
 - F. Meetings/Incentives/Business Travel

Market Segments

Diving and Snorkeling

The year-round temperate climate of the Florida Keys makes diving and snorkeling enjoyable in any season. The clarity of water provides excellent visibility and the variety of reef structures including the only living reef in North American attracts visitors to the Keys.

Fishing

We offer the greatest variety of fishing in the world. Twelve months a year visitors can compete in tournaments or simply enjoy a day on a charter boat excursion.

Historic/Cultural

The historic and cultural influences within the Florida Keys entices and marvels visitors. The architecture, art, music and historical tours turns the Keys into a number one sightseeing educational adventure. Our research shows that visiting historic places and museums consistently falls in the top for activities participated in by domestic and international visitors. Geotourists fall within this segment. They are people attracted to the cultural, historic, environmental, aesthetics and heritage of the places they visit.

Gay/Lesbian

The gay and lesbian market represents a broad perspective that spans national, cultural and language barriers. The gay market has a diversified travel experience with discretionary income. As one of the world's leading gay/lesbian destinations, Key West offers many opportunities to expand this market.

Mature or Senior (Retired)

Mature individuals (50+) account for nearly 25% of the total US population. This group is growing rapidly due to the aging of the 'baby boomer generation'. The financial power of mature consumers, coupled with their tendency to have more leisure time available for travel and their growing numbers make this segment one of particular strength. We will develop the opportunity to target upscale retired persons who can travel Sunday through Thursday, and during our slowest time periods of August and September.

Ecotourism

Eco-travelers are a specialty interest traveler and should be considered an excellent target market because they are a responsible visitor from whom we can profit, but also will respect our natural resources. Whether it is camping, bird watching, wildlife sightseeing, water related activities (diving, fishing, etc.) or learning the nature based heritage of the Florida Keys, this market is perfect for our destination. Ecotourism or nature-based tourism, acts on the principles of traveling to natural areas with the intentions of preserving the environment and the cultures associated with the region. Geotourists also fall in this segment.

Weddings/Honeymoon

The weddings/honeymoon market is a growing market that not only strengthens our 'off-season' months but is starting to become a year-around market for the Florida Keys. Florida is the most popular honeymoon US destination. Honeymoon trips will average 8 days with higher than normal expenditures.

Meeting/Incentive Business

The meetings and convention market segment remains fairly strong and significant part of some of the large properties having meeting room space. It is important to understand there are many options available within the meeting business market. The incentive travel business has increased in the past few years in the Keys.

Soft-Adventure

Adventure travel is one of the fastest and most interesting travel available to the consumer. Soft-adventure travel throughout the Florida Keys would include biking, snorkeling, kayaking, camping, diving, sport fishing and other related activities that seek exciting and sometimes risky experiences.

Boating

Boating has a wide range of markets including fishing, diving, power-boating, sailing, kayaking, yachting and leisure craft. The Florida Keys are a perfect destination for all kinds of events such as boat shows, races and any watersports activity. Whether the visitor rents, charters or uses their own boat, there are marinas from one end to the Keys to the other, to give the visitor a great boating experience.

IV. Promotional Analysis

1. Promotional Events

The promotion of special events is a very important part of our overall marketing program. Events not only draw visitors to our destination, but also gives visitors who may not have been aware of a certain event, the opportunity to experience different activities while on vacation and tell others about the experience. This develops return visits and adds new awareness of things to do for potential visitors.

We have marketing funds available for sponsored events in each of our districts. Each District Advisory Committee (DAC) establishes a Request for Proposal and allocates funding for that district destination events. Most event funding is for advertising only, however, in some cases that involves national sponsors and national or international marketing when funding as a turnkey operation is considered.

There are also cultural events promoted through the TDC Cultural Umbrella, and fishing tournaments promoted by the TDC Fishing Umbrella.

All event funding recommendations by the District Advisory Committees, Cultural Umbrella and Fishing Umbrella Committees are reviewed by the advertising agency and require approval by the TDC. These events are evaluated by their ability to draw visitors; offering of activities; and the marketing of the awareness and image of our destination.

Special Events

The Florida Keys hosts various annual activities and special events. This year's events and activities include:

- Key West Race Week – Key West – January
- Half Shell Half Marathon Run – Key West – January
- Upper Keys Rotary Flea Market – Islamorada - February
- Outdoor Art Show – Key Colony Beach – January
- West Marine Winter Warm-up Sail – Marathon – January
- The Monumental Brass Quintet – Marathon – January
- Florida Watercolor Society Art Show – Marathon – January
- Business & Professional Women's 5K Run – Marathon – January
- San Pablo Parish Festival – Marathon – January
- Marathon Garden Club Flower Show – Marathon – January
- 'Paws for a Cause' Pet Walk to Pigeon Key – Marathon – January
- Upper Keys Seafood Festival – Key Largo - January

Special Events – continued...

- Art Festival at Gulfside Village – Marathon – February
- 11th Annual Gigantic Nautical Flea Market – Islamorada – February
- Habitat for Humanity – Terry Cassidy's Superbowl Party – Big Pine Key – February
- Bay Jam – Key Largo – April
- Original Marathon Fl. Keys Seafood Festival – Marathon - March
- Art Festival at Key Colony Beach – Key Colony Beach – March
- Conch Republic Independence Celebration – Key West – April
- Art Festival at San Pablo Church – Marathon – April
- Spring Migration Mania – Stock Island – April - May
- 7 Mile Bridge Run – Marathon – April
- Lower Keys Jazz Festival & Art Show – Big Pine Key – April
- Key West Songwriter's Festival – Key West – May
- Lower Keys Jazz Festival – Lower Keys - May
- Marathon Offshore Grand Prix – Marathon – May
- Florida Keys Island Festival – Islamorada – May
- Barley's Bay Festival – Key Largo - May
- Green Sweep Volunteer Workday – Marathon – June
- Pridefest 2006 – Key West – June
- Cuban American Heritage Festival – Key West – June
- REEFWEEK 2006 – Key Largo/Islamorada – July
- Celebration of the Sea – Key Largo – July
- Key West Summer Food & Wine Festival – Key West – July/August
- Islamorada Swordfish Tournament – Islamorada – August
- Poker Run – Miami – Key West – Key West – September
- WomenFest Key West - Key West – September
- Fantasy Fest – Key West & Lower Keys - October
- Pro Wakeboard Tour – Marathon – October
- Key West World Championship Boat Races – Key West – November
- Key West International Jazz Festival – Key West – November - June
- Blue Angels in Paradise 2005 – Key West – November
- Corvettes In Paradise – Islamorada – November
- Hibiscus Pedal 2006 – Marathon – November
- 2006 Sombrero Club Regatta – Marathon – November
- Holiday Isle Women's Basketball Tournament – Islamorada – November
- Island Jubilee – Key Largo – November
- Orange Bowl Swimming Event & Winter Training – Key Largo – December
- Big Pine Key Winterfest 2006 – Art & Music in a Natural Key – Big Pine Key – December

Fishing Tournaments

- Key Largo Sailfish Challenge - Key Largo – January
- 30th Annual Holiday Isle Sailfish – Islamorada – January
- Cheeca Lodge Presidential Sailfish – Islamorada – January
- Islamorada Fishing Club Sailfish – Islamorada – January
- Hog’s Breath King Mackerel – Key West – January
- 15th Annual Swamp Guides Fishing Tourn. – Islamorada – January
- Islamorada Women’s Sailfish Tournament – Islamorada – February
- World Kingfish Championship – Key West – February
- 2nd Annual Scientific Anglers Women’s World Invitational Fly Championship backcountry Series – Islamorada – February
- 8th Annual Capt. Leon Shell Billfish – Marathon – February
- Backbone Lures “Fish ‘Til You Lose It” – Islamorada – March
- Key West Fishing Tournament (Kick Off) – Key West – March - November
- Del Brown Invitational Permit Tournament – Key West – March
- Islamorada All-Tackle Spring Bonefish – Islamorada – March
- Sunset Tarpon – Marathon – April
- Ghost Hunt Tournament – Key Largo – April
- World Sailfish Championship – Key West – April
- Key West Classic – Key West – April
- 20th Annual McDonalds Invitational Tarpon – Marathon – May
- 30th Annual Ladies Tarpon Tournament – Marathon – MAY
- Faro Blanco Tarpon Tournament – Marathon – May
- Rolex/IGFA Inshore Championship Tournament – Islamorada – May
- Islamorada Tarpon Masters – Islamorada – May
- 40th Annual Marathon International Tarpon – Marathon – May
- 20th Annual Coconuts Dolphin Tournament – Key Largo – May
- 11th Annual Outback Steakhouse Golden Fly Invitational Fly Tarpon Tournament – Islamorada – May
- Dolphin Master Invitational – Key West – May
- Islamorada Fishing club Captain’s Cup Dolphin – Islamorada – June
- Dick Fuhr Memorial Fishing Tournament – Key Largo – June
- Big Pine & Lower Keys Dolphin Tournament – Big Pine Key – June
- Don Hawley Invitational Tarpon Tournament – Islamorada – June
- 30th Annual scientific Angers Women’s World Invitational Fly Championship - Tarpon Series – Islamorada - June
- Cancer Foundation Dolphin Tournament – Cudjoe Key – June
- 20th Annual Father’s Day Dolphin Derby – Marathon – June
- Gold Cup Tarpon Tournament – Islamorada – June
- Burdines Waterfront 5th Annual Dolphin & Black Fin Tuna Fun Fishing Tournament – Marathon – June
- Key West Gator Club Dolphin Derby – Key West – June
- Conch Republic Ladies Dolphin – Key West – June
- Key West Fishing Tournaments Sword Fishing – Key West – June

Fishing Tournaments – continued...

- Holiday Isle/Caribee Dolphin Tournament – Islamorada – July
- Ladies, Let's go Fishing Reel A The Reef – Ocean Reef – July
- Key West Marlin Tournament – Key West – July
- Islamorada Fishing Club Red Ghost Stalk – Islamorada – July
- Key West Fishing Tournaments Flats S.L.A.M. – Key West – July
- Mercury Redbone @ Large Little Palm Island Grand Slam – Little Torch Key – August
- Mercury Redbone Celebrity S.L.A.M. – Key West – September
- Islamorada Inv. Fall Fly Bonefish – Islamorada – September
- Marathon International Bonefish tournament – Marathon – September
- Mercury Redbone Celebrity Baybone – Key Largo – September
- 10th Annual Scientific Anglers Women's World Invitational Fly Championship – Bonefish Series – Islamorada – October
- Mercury Outboards Bonefishing World Championship Islamorada All-tackle Bonefish – Islamorada – October
- Action Craft's 14th Owners Tournament – Islamorada – October
- Ladies, Let's Go Fishing Islamorada – Islamorada – October
- Take stock in the Children Backcountry Challenge – Key Largo – October
- George Bush/Cheeca Lodge Bonefish – Islamorada – November
- Marathon Sailfish Season Open – Marathon – November
- Ocean Reef BTU Backbone Classic – Ocean Reef – December
- Islamorada Sailfish Tournament – Islamorada – December
- Florida Key Gold Cup Sailfish Championship – Islamorada – Dec.- January
- Mercury Cheeca/Redbone Celebrity – Islamorada – December
- Islamorada Fishing Club Captain's Cup Sailfish - Islamorada – December
- Islamorada Junior Sailfish Tournament – Islamorada – December
- Metropolitan South Florida Tournament Mini-Met (Kick Off) – Islamorada – December through May
- Don Gurguolo Sailfish Classic – Islamorada – December

Historical, Cultural and Entertainment Attractions

- Art Under the Oaks - Key Largo – January
- Sculpture Key West – Key West – January – March
- Florida Keys Medieval Festival – Lower Keys – January
- Middle Keys Concert Season – Marathon – January thru March
- 24th Key West Literary Seminar: Humor - Key West – January
- Key West Writers' Workshop – Key West – January - February
- Key West Craft Show - Key West – January
- Pigeon Key Art Festival - Marathon – February
- H. S. Truman Legacy Symposium & Exhibit – Key West – February
- Civil War Heritage Festival – Key West – February
- Old Island Day Art Festival - Key West – February
- Rites of Spring Art & Craft Show – Lower Keys - March
- Rain Barrel 24th Annual Arts Festival - Islamorada – March
- Key Largo Home & Garden Tour – Key Largo – March
- 29th Annual House & Garden Tours – Marathon – March
- St. Patrick's Day Parade – Marathon – March
- Robert Frost Poetry Festival 2006 – Key West – April
- 22nd Underwater Music Festival – Music & Art in the Key of Sea - Big Pine Key – July
- Key Players Season – Key Largo – October thru April
- Fl. Keys Birding & Wildlife Fest – Key Largo/Marathon/Lower Keys – September/October
- Marathon Community Theatre - Marathon – October thru September
- In Their Own Words , The History of Key West – Key West – October thru February
- Man, 3000 Years Under the Sea – Islamorada – October thru September
- Island Opera Theatre Concert Series–Key West/Lower Keys/ Marathon/ Islamorada/Key Largo – October thru June
- Key West Pops Orchestra – Key West – October thru March
- Key West Symphony Orchestra – Key West – October thru June
- M. Fisher Museum-Sunken Treasure- "Silver!: Plata Del Mar" - Nov – Sept
- Performance at St. Paul's – Key West – November – May
- Red Barn Theatre - Key West – November – October
- Blue Sky Art & Craft Show – Lower Keys – November
- Tennessee Williams Fine Art Center - Key West - Nov. thru June
- Impromptu Concerts - Key West - Nov/Jan/Feb/Mar/Apr/June/ July
- Fla. Keys Art Guild Outdoor Art Fests – Marathon/Isla./Key Largo – Nov thru April
- South Florida Center for the Arts – Key Largo – November thru March
- Pirates in Paradise Festival – Key West – November thru December
- Pops in the Park – Islamorada – November thru April

Historical, Cultural and Entertainment Attractions – continued...

- 46th Annual House & Garden Tours - Key West - Jan/Feb/March
- 44th Annual Conch Shell Blowing Contest – Key West – Jan/Feb/March
- 9th Annual Christmas Exhibit – Marathon – December
- Florida Keys Holiday Festival – Islamorada – December
- Founders Society 26th Anniversary of Sterling Performances – Key West – December thru April
- Waterfront Playhouse - Key West – December - May
- Key West Playwrights Company – December - March
- FKCC – ‘Keys Chorale’ Concert Season – Key West – Dec-Mar

2. Capital Projects and Improvements

The Tourist Development Council has revenues other than for advertising for discretionary use to enhance and support the specific tourism development efforts of a district. One of the uses is capital projects. The attraction of tourists to the area must be one of the capital project’s main purpose. The capital project must be a publicly owned and operated facility or owned and operated by a not-for-profit organization and open to the public.

Capital improvements can also include beach improvements, beach maintenance, renourishment, enhancements and clean up where there is public access to the beach or beach park area.

Capital projects are very significant to the marketing of the awareness and image of a destination. It is important within the descriptive profile of our product that we have public facilities such as museums, recreational areas, beaches, monuments and other historic and cultural attractions for our visitors.

Another important aspect to funding public facilities and areas is that these projects and improvements are not only beneficial to our visitors, but also to the residents of Monroe County. The capital projects program helps preserve nature and historic sites in the Keys. It also enhances the local culture and supports the geo-tourism efforts of our marketing program.

We have developed a three to five year capital projects plan for each district community. The District Advisory Committees, with input from Monroe County, local municipalities, chambers of commerce and general public, have formulated a vision of what each community would like to see developed or maintained by the county.

Section Three : Program Planning

I. Program Development

i. Overall Marketing Goals (measures of accomplishment)

- a. Develop overall program which balances the county's economic viability while preserving the environment and quality of life for residents.
- b. Increase number of capital improvements projects.
- c. Expand cultural/historical campaigns.
- d. Expand Eco-tourism campaigns.
- e. Increase Internet promotional program.
- f. To increase visitor expenditures.
- g. To increase longer stays.
- h. Increase marketshare of international visitors.
- i. Increase group and incentive meeting business.
- j. Create a comprehensive public relations program for markets outside of the United States.
- k. Increase awareness of the Keys to the film industry for promotional opportunities.
- l. Increase diversity of multicultural marketing.
- m. Develop guidelines for measuring the effectiveness of the advertising, public relations and sales programs.
- n. Increase Gay/Lesbian travel market.
- o. Increase co-operative efforts with Visit Florida Tourism programs.

II. Top Marketing Priorities

- a. Strengthen year-round tourism program.
- b. Develop top-of-mind awareness of the Florida Keys as the premier get-away destination to the US and international markets.
- c. Promote markets that will have the most significant positive economic impact on the lodging industry.
- d. Promote historical, heritage, environmental, artistic & cultural geo-tourism program.
- e. Promote ecotourism and soft-adventure.
- f. Development of capital projects and improvements.
- g. Promote the Fishing Industry.
- h. Promote the Dive Industry.
- i. Promote Gay/Lesbian Market.
- j. Identify and market to the visitor with the highest average daily expenditure for longer stays.
- k. Develop international markets.
- l. Promote attractions.
- m. Promote awareness of the Marathon Airport and development of direct flight service in the Florida Keys.
- n. Promote special events.
- o. Diversity in multicultural marketing communication.
- p. Expand Customer Relations Management (CRM) program.
- q. Development of our overall Internet Marketing Program.
- r. Promote Family Travel.
- s. Promote Weddings/Honeymoons.

III. Resources (to execute program planning)

- a. **Board:** Monroe County Tourist Development Council
- b. **DAC's:** Monroe County District Advisory Committees
- c. **Staff:**
 - Marketing Director - Senior executive executing the goals, objectives and policies set by the TDC
 - Office Manager - responsible for daily operation of the Administrative Office - monitoring budgets
 - Director of Sales - responsible for coordination of sales as directed by TDC
 - Director of Research - responsible for the coordination of research as it relates to requirements of TDC
 - Administrative Assistant - responsible for the coordination of daily office duties through the direction of Office Manager
 - Finance Assistant - responsible for annual report, reviews invoices & reimbursement requests, assistance in other areas of operation
 - Administrative Secretary - responsible for reception, telephones, assisting with meeting preparation and general office duties
 - Office Assistant – responsible for reception, telephone, administrative support and general office duties
 - Sales Assistant - provides clerical and secretary support to the Sales Department
 - Sales Managers - responsible for special market segments and their performance
 - Film Liaison - bring awareness of the Florida Keys as a film, television, video and print location and to assist and support to production shooting in the Keys
- d. **Training:**

Staff training and development is another process within our program. Employee development is a continuous process of reviewing basics and learning new materials and techniques. Training can help reduce employee turnover by increasing productivity, motivation and job satisfaction. The kinds of training include departmental orientation, market knowledge and market techniques.

The Governor's Conference on Tourism offers many educational opportunities within their program that include sales, research, tourism marketing and administration.

Training - Continued...

The Florida Association of Convention and Visitors Bureaus/TDC's has an educational initiatives program with its membership.

The Florida Commission on Tourism and Visit Florida are developing joint tourism marketing workshops to help service the industry.

The Hospitality Sales and Marketing Association International has workshops and a Florida Keys charter who meet regularly and presents speakers, networking and educational opportunities for staff.

e. Agencies of Record

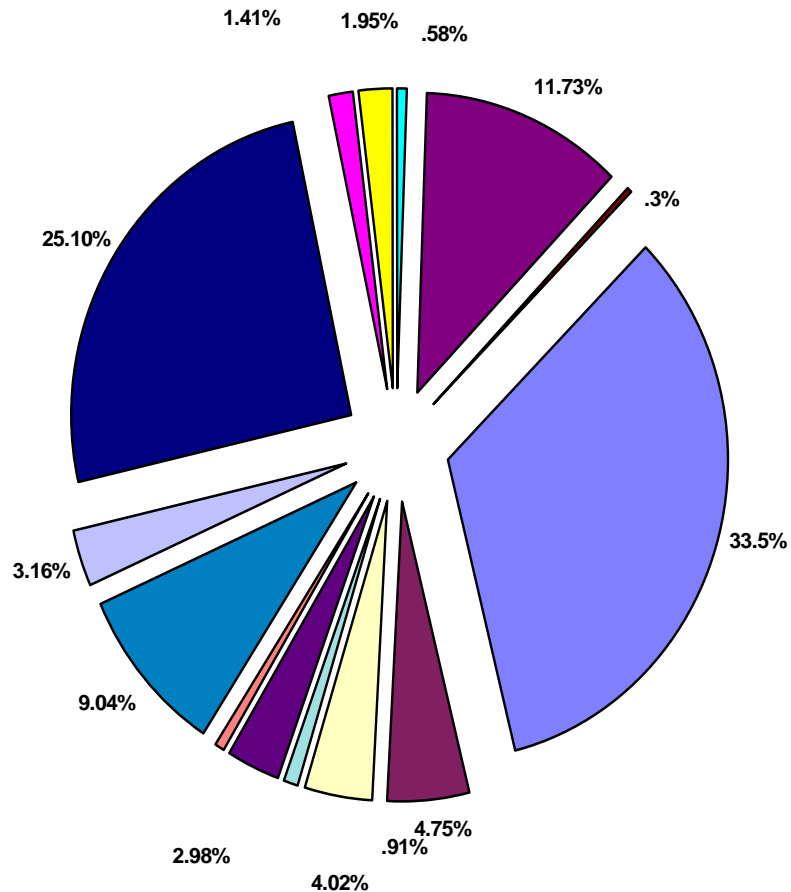
1. Tinsley Advertising - Advertising
2. Stuart Newman Associates – Public Relations
3. FloridaKeys.com – Website Provider

f. Support Agencies

1. Cellet - United Kingdom and Germany (sales)
2. McCluskey Associates - United Kingdom, Germany, France and Italy (PR)
3. The Market Share Company - Key West, Fl. - (fulfillment)

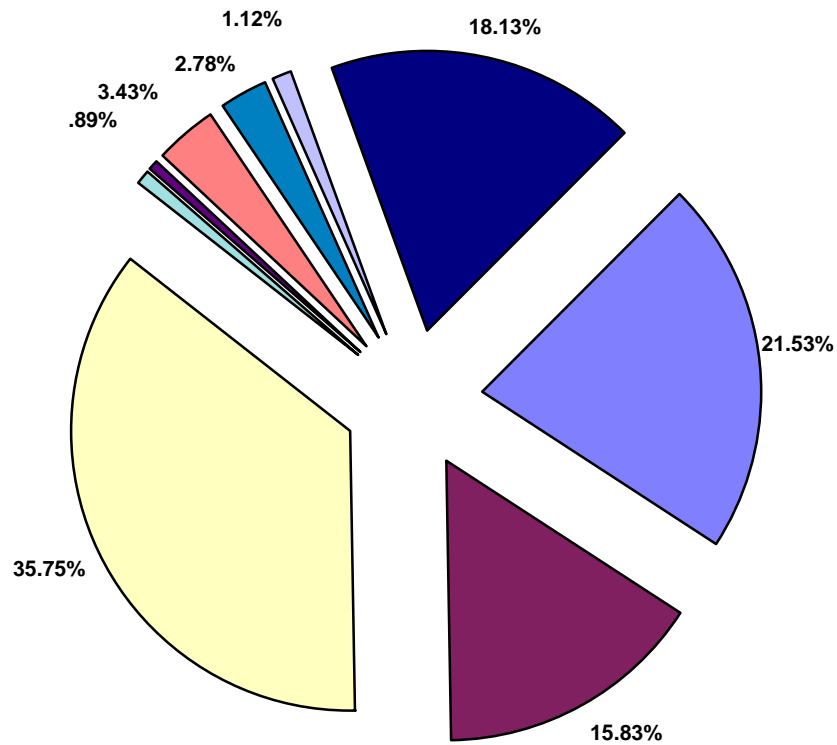
g. Budget (as legislation directs)

FY 2006 TDC THREE PENNY BUDGET
\$24,305,070* preliminary



Advertising - \$8,141,496 - 33.50%	Public Relations/Ameurop - \$1,154,400 - 4.75%
Sales/Mkt. - \$977,550 - 4.02%	Research - \$221,000 - .91%
Admin/Overhead - \$725,100 - 2.98%	Finance/Attorney - \$139,024 - .57%
Umbrellas/Events - \$2,197,315 - 9.04%	VIS/Fulfillment - \$767,500 - 3.16%
Capital - \$6,101,086 - 25.10%	Resources - \$343,098 - 1.41%
Cty. Cost Allocation - \$473,000 - 1.95%	Film - \$142,000 - .58%
Emergency - \$2,850,000 - 11.73%	Monroe Council of the Arts - \$72,500 - .30%

FY 2006 TDC TWO PENNY BUDGET "EVENTS" (35%) Portion \$5,104,476* preliminary

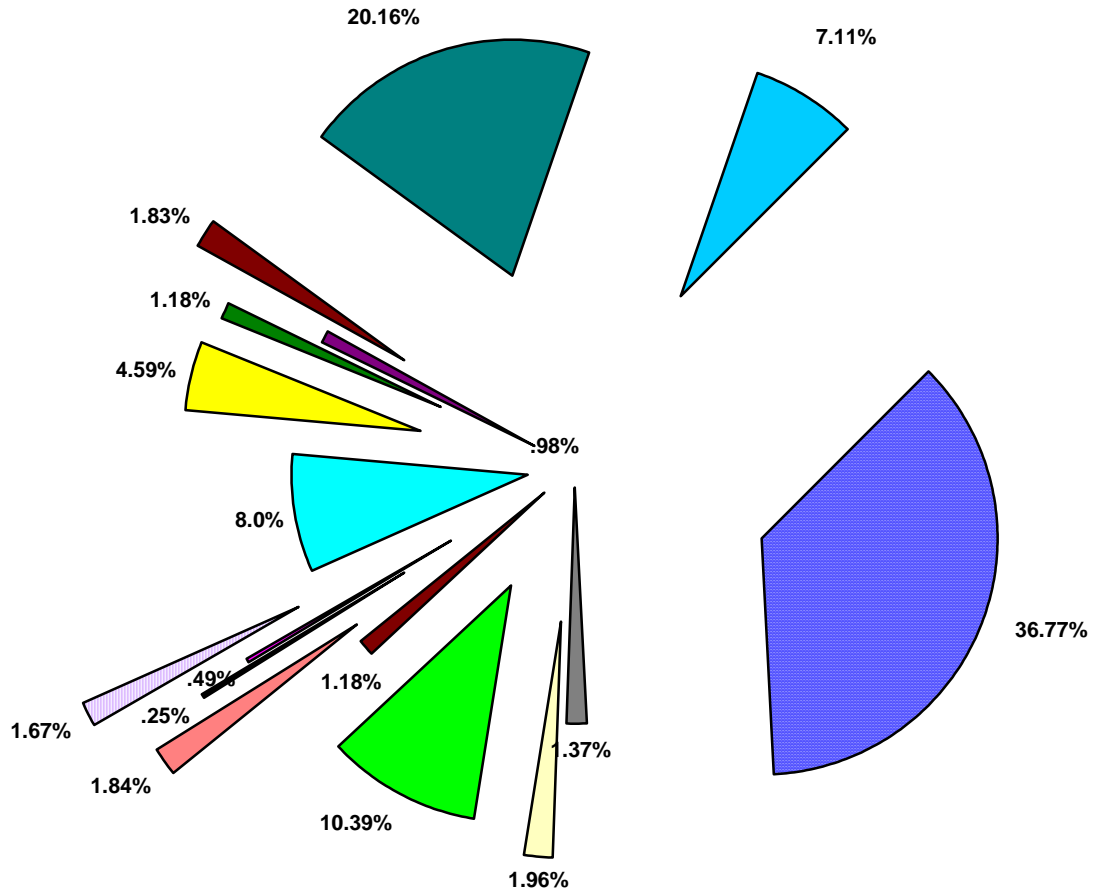


Public Relations/Ameurop - \$1,098,900 - 21.53%
Emergency Reserve - \$807,833 - 15.83%
Cultural/Fishing/Diving Umbrellas - \$1,825,100 - 35.75%
Finance/Attorney Salary - \$45,479 - .89%
Resources - \$27,898 - .55%
Fulfillment - \$175,000 - 3.43%
Film - \$142,000 - 2.78%
County Cost Allocation - \$57,032 - 1.12%
Special Projects (Capital) - \$925,234 - 18.13%

FY 2006 TWO PENNY BUDGET

'Administrative' (7%) Portion

\$1,019,957 preliminary

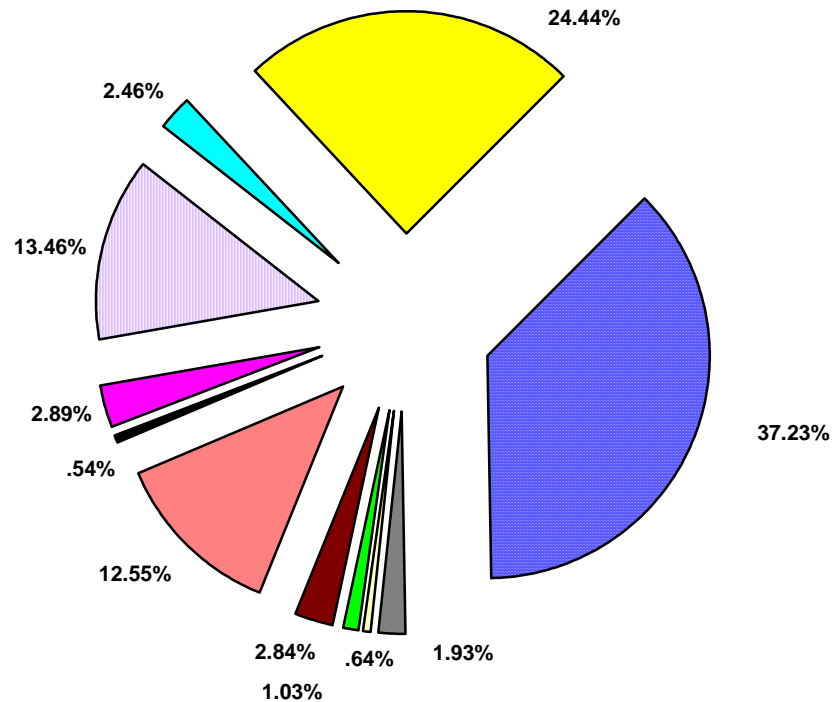


Admin/Operating - \$375,000 - 36.77%	Administrative Advertising - \$14,000 - 1.37%
Travel - \$20,000 - 1.96%	Business Lease - \$106,000 - 10.39%
Communications - \$12,000 - 1.18%	Supplies - \$18,740 - 1.84%
Courier - \$2,500 - .25%	Cleaning - \$5,000 - .49%
Repair/Rentals - \$17,000 - 1.67%	Resources - \$81,618 - 8.0%
Finance/Attorney - \$46,811 - 4.59%	Visit FLA - \$12,000 - 1.18%
Capital Outlay - \$10,000 - .98%	County Cost Allocation - \$18,706 - 1.83%
Emergency - \$205,582 - 20.16%	Dues/Subscrip. - \$2,500 - .25%
Monroe Council of the Arts - \$72,500 - 7.11%	

FY 2006 TWO PENNY BUDGET

'Advertising & Promotional' (65%) Portion

\$7,789,699 * preliminary



- Advertising - \$2,900,000 - 37.23%
- Media Materials - \$15,000 - 1.93%
- Ad. Expenses - \$50,000 - .64%
- Collateral - \$80,000 - 1.03%
- Research - \$221,00 - 2.84%
- Sales - \$977,550 - 12.55%
- Fulfillment/Trade - \$42,000 - .54%
- Resources - \$225,018 - 2.89%
- Emergency Reserves - \$1,048,464 - 13.46%
- County Cost Allocation - \$191,507 - 2.46%
- *Special Projects (Capital) - \$1,904,160 - 24.44%

Other Resources

1. Chambers of Commerce (Key Largo, Islamorada, Marathon, Big Pine Key, Key West)
2. Lodging Association of the Florida Keys and Key West
3. Key West Innkeepers Association
4. Key West Business Guild
5. Key West Attractions Association
6. Key West Bar and Restaurant Association
7. Heart of the Keys Tourist Association (Marathon)
8. Federation of Chambers
9. Florida Keys Council of the Arts (Cultural Umbrella contract)
10. Florida Keys Fishing Tournaments, Inc. (Fishing Umbrella Contract)
11. Keys Association of Dive Operators (KADO) (Dive Umbrella contract)
12. Visit Florida – State Tourism Office
13. Hospitality, Sales & Marketing Association International (Florida Keys Chapter)
14. International Association of CVB's
15. Fl. Association of Convention & Visitor Bureaus & TDC's
16. TDC sub-committees

II. Marketing Strategies, Methods, Implementation and Measurability

In the following sections are specific plans by department:

- I. Advertising**
- J. Sales**
- K. Public Relations**
- L. Film Commission**
- M. Research**

I. Advertising

Advertising is the primary marketing engine for the TDC. Through media, the agency can establish a style and attitude for the destination that sets it apart from the competition, and then project this image to a large audience, creating positive reasons to visit the destination.

Print advertising includes magazines and newspapers. Magazines allow us to target our messages demographically and geographically with high-quality photo reproductions and a long shelf life. Newspapers, on the other hand, offer the ability to communicate tactical retail offers and flexibility in terms of ad position, strong local market coverage, relatively low cost, quick response placement, and broad public acceptance.

Non-print advertising, or broadcast, includes television, radio, and the Internet. Television brings our message to life, teasing the senses with compelling sights and sounds of the destination. Strategic radio buys allow us to promote special events to targeted listeners and to give quick-response marketing at needed times. Our continued use of Internet advertising enables us to deliver comprehensive, up-to-the-minute information and imagery to anywhere in the world, at the touch of a button.

The Internet has become a full-fledged medium in its own right. Essentially, it's the world's best travel encyclopedia, and content is king. Using a powerful combination of broadcast and print advertising, viewers on this highly interactive medium can spend as much time as they want learning about the destination. We will be active on the web with banners, search engine words and listings, direct response e-mail, e-marketing efforts and on-line fulfillment. We will also build our consumer base from our web site with e-permission responses covering various Keys activities and promotions.

Other forms of advertising include brochures, billboards (outdoor, suburban transit), CDs, direct mail and other promotional and give-away materials. Such advertising can have an effect upon the perceived desirability of the destination and project a constant and controlled reminder to visit and revisit.

Objectives

1. Develop top-of-mind awareness and image of the Florida Keys & Key West as the premier Florida destination for leisure or business travel for the domestic and specific international markets.
2. Create and maintain a campaign that highlights the reasons and motivations to visit and "protect" our destination.
3. Develop a creative and flexible media plan for year-round tourism for the Florida Keys. As well as execute the most efficient media buy to reach the affluent traveler.
4. Maintain a unique marketing identity in relation to competitive destinations.
5. Work with travel partners, umbrellas (Fish, Dive, Cultural), special event managers, and meeting planners to promote the Florida Keys & Key West as a total destination.

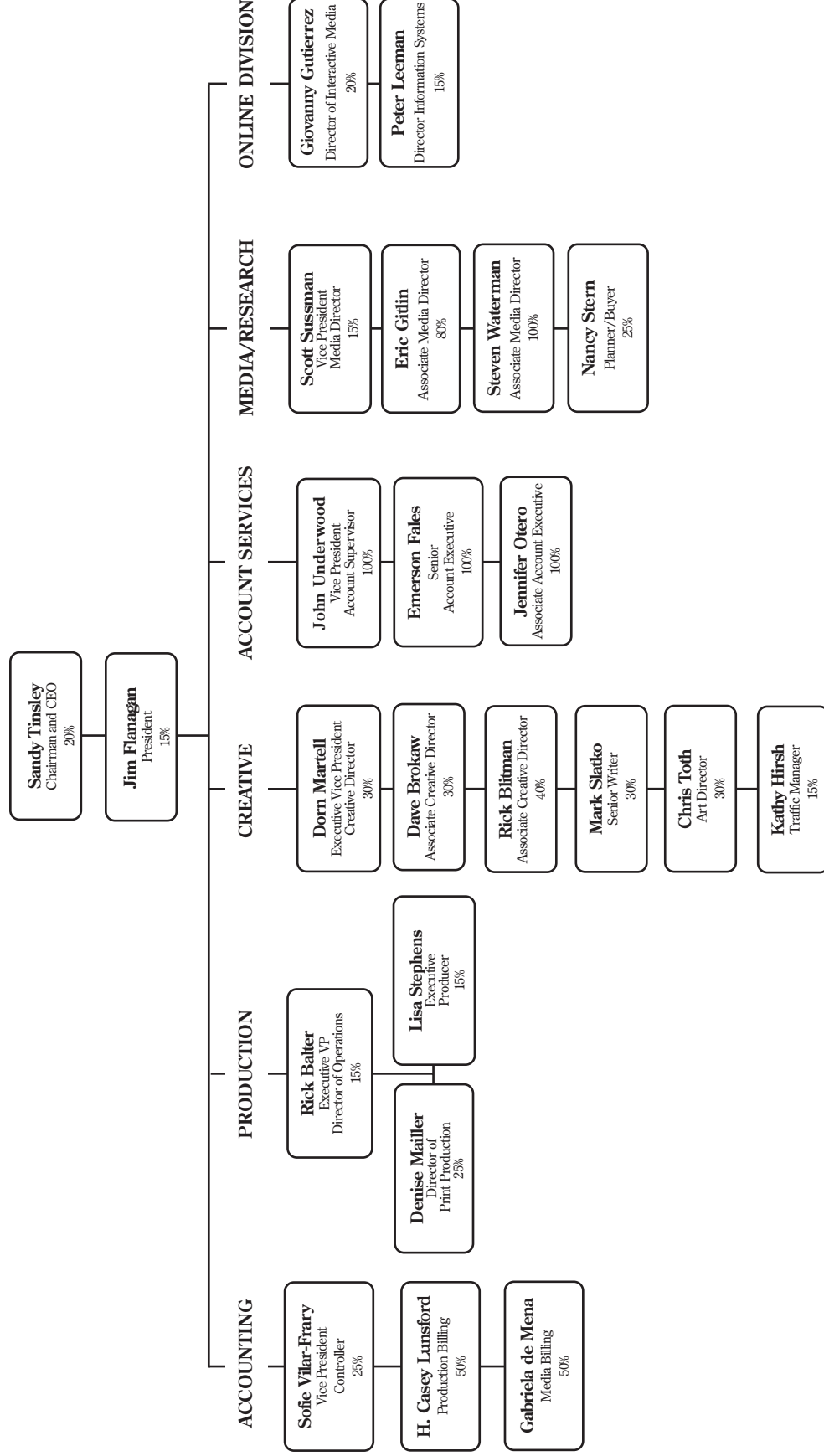
6. Bolster our campaign with value-added opportunities and co-op advertising within existing media and plan future co-op in our consumer e-marketing efforts.
7. In all efforts, drive consumers to our web-site for immediate information, service and point of sale.

Goals

1. Create a new television spot that promotes Charter Boat Fishing throughout the Florida Keys.
2. Increase market share of international visitors with a concentration in the UK and German markets.
3. Develop an “Own a City” campaign in the Washington DC/Beltway market.
4. Increase e-marketing efforts within all advertising campaigns.
5. Increase visitor response to our web site.
6. Develop a new suburban transit advertising campaign within the metropolitan New York area to increase market share within that region.
7. Create and produce a new meeting planners guide.
8. Increase longer stays in lodging.



Account Team



Target Marketing

One of the essential elements in any marketing plan is that of identifying and selecting target markets. This is called market segmentation. Competition has become so sophisticated that we must identify and carefully define our target markets to be effective in our advertising.

We can identify our market in categories such as leisure travelers, travel trade, group or business and specialty markets. But it is fundamental that we know and understand the characteristics of these various market segments. Advertising must examine these market segments through demographics, psychographics and geographic analysis. The key is to identify who is traveling, where they are coming from and what was their motivation for making the trip. We want to turn our target market into a captive audience. We will continue to develop more diversity in multi-cultural marketing as well as in special interests this year. Consumers respond best to the messages and images that reflect an insight into their culture and specific interests.

We will continue to develop and refine our electronic or Internet marketing. We will use the Internet through search engines, search words, links, banners and email blasts to key in on specific markets, both nationally and internationally. We will also target respondents to our website and other travel related sites who opt-in for additional information and promotions.

The Advertising Agency will also continue to work with the research arm of the Tourist Development Council on visitor analysis to help identify new and emerging markets.

We will once again look to develop some “own a city” campaigns, where we will choose emerging markets and create comprehensive promotional campaigns. These campaigns will include advertising, public relations, sales and other marketing elements, in a short period of time, to give significant promotional coverage in the targeted areas.

Branding

A brand is a name, term, sign, symbol, design or even a slogan identifying the product or services that differentiate it from the competition.

Brand equity is the marketing term for a brand's value in terms of awareness and perceived quality - in other words, its proven ability to draw and keep customers.

Branding can reflect personality and an attitude, such as our destination's theme, "Come as you are". Our Florida Keys and Key West positioning has become highly effective in creating consumer awareness of our laid back atmosphere and lifestyle. As the advertising reflects: Early riser or night owl. Fisherman or sun worshipper. Diver or tippler. Gourmet or gourmand. Art lover or souvenir hunter. Seeker of luxury or connoisseur of funk.

Branding also develops consumer loyalty, even when reasonable substitutes are offered at lower prices. People are willing to pay more because of the perceptions they associate with the name Florida Keys and Key West.

E-Marketing

Electronic marketing is one of our best methods for developing awareness and image in the most direct, time-efficient and personalized manner available. Interactive electronic marketing is more than a multimedia to entertain or engage a consumer. It is a higher level of strategic marketing allowing the consumer to respond to an interactive relationship with the product. This interactivity is the single element with the greatest impact on advertising and branding today and is part of our Customer Relationship Management (CRM) program. The ability to gather specific and up to the minute consumer feedback makes it possible to adapt advertising messages instantaneously, respond to consumer needs and evaluate the marketing effort.

Our e-marketing campaign will focus on search engines, search words, link-throughs and e-mail blasts and e-newsletters. This year we will continue to offer co-op electronic advertising for our industry partners.

One of the best features of e-marketing is that it enables us to measure the effectiveness of our efforts on a daily basis. Because the advertising is electronic and is direct, it allows us to track the information back to the user or allows us to see if the methods of marketing attracted the potential visitor. We are also able to determine how the visitor came to our site, either by banner, search engine words, web site address or by a hyperlink.

Another important feature of e-marketing is that it can be a global advertising message, twenty-four hours a day, three hundred and sixty-five days a year, at a reasonable cost for all the value marketing features available for our use.

Target Audiences

- **Consumer**

The general target audience for The Florida Keys & Key West is affluent adults.

- By targeting the affluent adult, we ensure delivery of our message to this segment. We also achieve delivery to the “aspirational” element of a broader audience: those with less income who aspire to experience a quality vacation and thus will be more likely to travel to the Florida Keys & Key West.

Within this group, “umbrella” campaigns will be skewed to prospects with special interests:

- **Leisure Travel**

- Geotourism
- Diving
- Fishing
- Cultural/Historic/Art
- Gay/Lesbian
- Mature
- Ecotourism
- Weddings/Honeymooners
- Soft-Adventure
- Romance
- Family Travel

- **Travel Trade**

- Travel Agents/Tour Operators, both nationally and internationally.
- Meeting Planners, for small to mid-size meetings

- **International Travel**

International advertising efforts will have a primary focus on the consumer this year as these travelers are becoming more independent on making their own plans for visiting the U.S. With the growth of the Internet, the destination has increased its presence on search engines and travel specific web sites. We will also use email blasts and e-newsletters as direct promotions. Although the Internet has made English the primary language of the world, however we will be translating some of our web site content into various foreign languages. Our work with our UK and German representatives will continue to forge efforts targeting the travel trade industry and the consumer. The economy will also be a factor and the value of the dollar to each country’s monetary currency.

Geographic, domestic and international target markets are described within the prospect analysis.

Domestic Target Audience

AFFLUENT ADULTS AGE 35-64, HHI \$75,000+

	Population	% of Total	Index
AGE 35-64, HHI \$75,000+	40,219,000	100%	131
Total Men	20,260,000	50.4%	100
Total Women	19,959,000	49.6%	100
Age 35-39	6,732,000	16.7%	131
Age 40-44	8,293,000	20.6%	131
Age 45-49	8,746,000	21.7%	131
Age 50-54	7,769,000	19.3%	131
Age 55-64	8,679,000	21.6%	131
HHI \$75,000-\$99,999M	16,775,000	41.7%	97
HHI \$100,000-\$149,999M	14,745,000	36.7%	101
HHI \$150,000-\$199,999M	4,685,000	11.6%	104
HHI \$200,000-\$249,000M	1,798,000	4.5%	105
HHI \$250,000+	2,219,000	5.5%	103
Married	36,187,000	90.0%	102
Single	1,205,000	3.0%	72
Professional/Managerial	19,722,000	49.0%	102
College Graduate	12,758,000	31.7%	94
Own Primary Residence	39,409,000	98.0%	101
2+ Airline Trips in Past Year	19,992,000	49.7%	99
5+ Nights in Hotel/Motel	27,702,000	68.9%	102
Northeast	8,681,000	21.6%	99
Midwest	9,462,000	23.5%	101
South	13,028,000	32.4%	101
West	9,048,000	22.5%	96

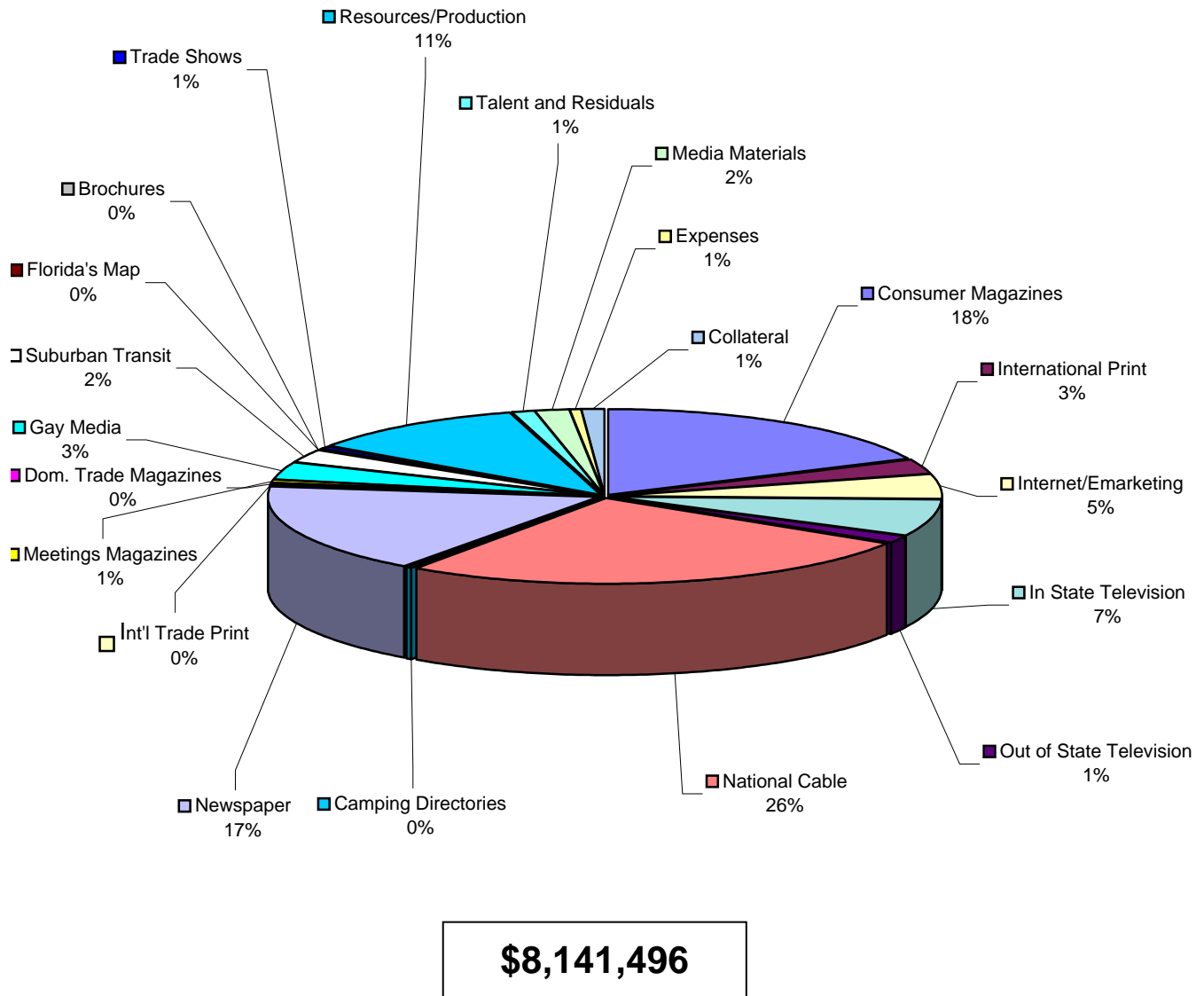
Source: 2004 Monroe Mendelsohn Head of Household Affluent Study.

Index

An index is used to express the percent difference from the average. The average is always 100. Any number above 100 represents the percent above average.

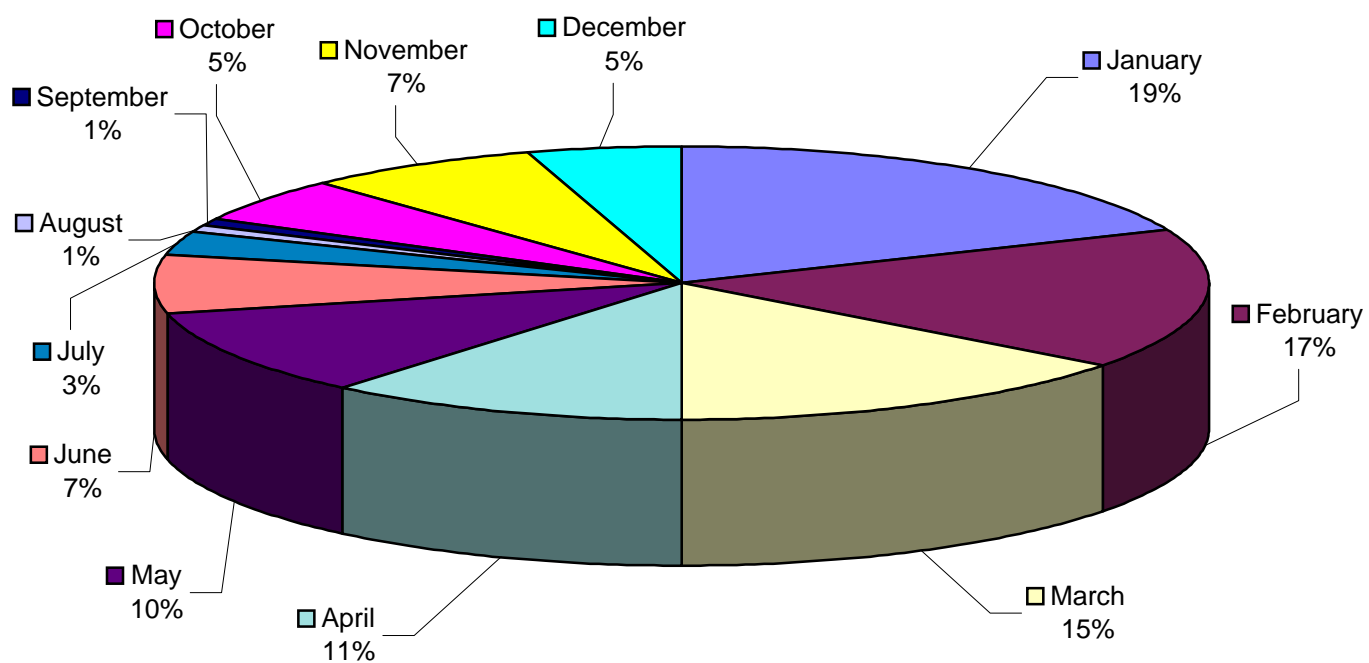
For example, Married=102 index. This means that our target population is 2% more likely than the average to be married.

2005-2006 TOTAL PLAN



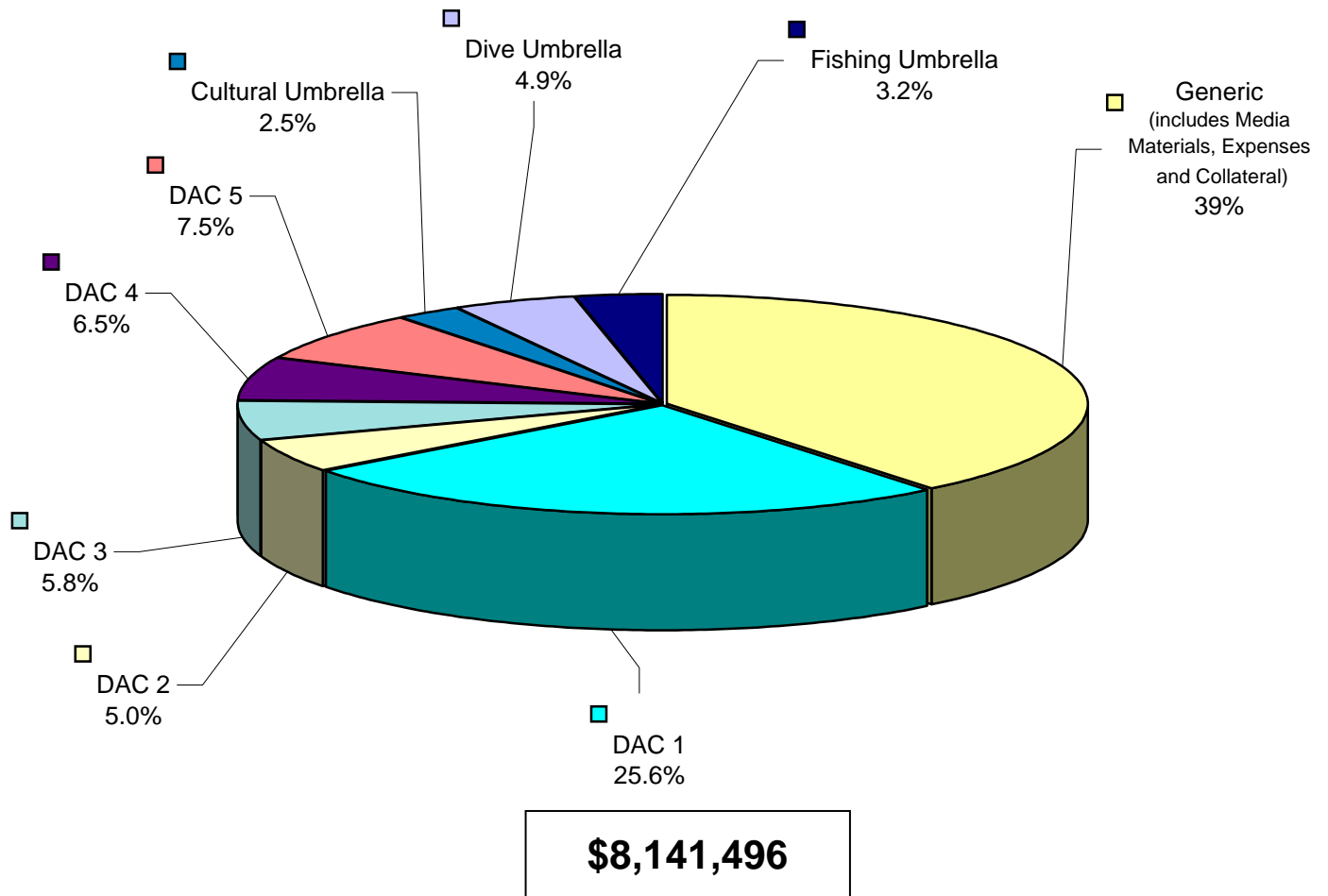
NOTE: Miscellaneous includes Media Materials, Talent and Residuals and Future Fund

2005-2006 MONTHLY MEDIA SPENDING



\$6,846,833 Media

2005-2006 ADVERTISING BREAKOUT



Co-op Advertising

Cooperative advertising was introduced to provide accommodations, businesses, and attractions direct access to major travel markets at a cost-effective rate.

The co-op program currently has over 100 participants involved in generic, district and umbrella opportunities.

- Due to limited availability, all co-op space and time is on a first come, first served basis.
- Space / time reservations are arranged through your media insertion order form from your agency, and/or your check made out in the full amount for the co-op program you are participating in.
- ONLY Florida Keys & Key West messages are allowed in any co-op ad.
- Magazine. There must be at least four participants for each page. Co-op will be offered in various formats.
- Newspaper Generic. There must be a minimum of 4 participants in each ad.
- Newspaper District. Whether the co-op is display or listing, there must be at least two participants.
- Electronic marketing opportunities.
- All advertising materials must be supplied in accordance with the individual co-op offering.
- The Agency of record will have final creative control. If the Agency feels that any co-op participant has sent material detrimental to the destination or the message does not follow all county ordinances, it will be rejected and all monies will be returned.
- Co-op is initially for bed-tax paying properties only, unless other opportunities are approved and offered for other businesses within the Keys that help promote the destination (galleries, attractions, restaurants etc.)

Rates will be divided as follows:

Accommodation / Attractions

Other:

Contact Tinsley Advertising on rates for businesses not falling into the Accommodations/Attractions category. †

Exact rates will be quoted on individual co-op opportunities to follow.

† Co-op Advertising Rate Policy:

I. The same rate shall be charged for accommodations and tourist attractions due to the advertising value inherent in materials promoting the beautiful surroundings, lush accommodations, historic, eclectic, or other appeal of the properties.

II. Other entities may be charged a higher rate based on the fact that the overhead and direct costs are presumed to differ significantly from those for accommodations and attractions and based on the lower degree of innate value to the promotional material of an entity such as reservation services or other providers of goods and services which are not marketing and presenting the images of the Keys which would be inherent in the accommodations and attractions advertisements.

COLLATERAL AND FULFILLMENT

The Market Share Company handles all fulfillment requests by the VIS operations through the Chambers of Commerce, TDC Office and Tinsley Advertising.

Call to Action #'s:

- **U.S.A:** 1-800-FLA-KEYS (For destination brochures).
This is a consumer line that is answered live at the chambers during business hours; voice mail after hours.
- **South America:** 001-305-296-1552 (For brochures, videos/rate guides). 001-305-296-0788 (Fax)
This is a South American travel trade line that is answered live at the TDC office during business hours; voice mail after hours.
- **U.K:** 01564-794555 (For brochures, videos or rate guides). 01564-795333 (Fax)
This is a United Kingdom/Ireland travel trade line that is answered by our sales staff at Cellet Travel Services.
- **Germany :** 0221-2336-451 (For brochures, videos or rate guides. 0221-2336-450 (Fax)
This is a German travel trade line that is answered by sales staff.
- **Fishing Umbrella:** 1-888-FISH-KEYS (For fishing video and tournament guide).
This is a consumer line that is answered at USA 800. If the caller would like the fishing video, the operator will take down the caller's name, address, phone number and credit card number. A video and tournament guide will arrive no later than two days after the order is taken. If the consumer only wants the tournament guide, the operator will take the caller's name and address and the brochure will be mailed within two days.
- **Key Largo:** 1-800-822-1088 (For the Generic Destination Accommodations Guide and/or CD and information).
This is a consumer line that is answered live at the Key Largo Chamber during business hours; voice mail after hours.
- **Islamorada:** 1-800-FAB-KEYS (For the Generic Destination Accommodations Guide and/or CD and information).
This is a consumer line that is answered live at the Islamorada Chamber during business hours; live at USA 800 after hours.
- **Marathon:** 1-800-2-MARATHON (For the Generic Destination Accommodations Guide and/or CD and information).
This is a consumer line that is answered live at the Marathon Chamber during business hours; voice mail after hours.
- **Lower Keys:** 1-800-USA-ESCAPE (For the Generic Destination Accommodations Guide and/or CD and information).
This is a consumer line that is answered live at the Big Pine Key Chamber during business hours; voice mail after hours.
- **Key West:** 1-800-LAST-KEY (For the Generic Destination Accommodations Guide and/or CD and information).
This is a consumer line that is answered live at the Key West Chamber during business hours; voice mail after hours.
- E-mail requests to chambers and TDC office are downloaded by the TDC and passed along to the fulfillment house.

Fulfillment Houses:

- **The Market Share Company (MS) - Key West, FL**
They control all district, generic trade, generic consumer and trade requests daily to MS. They are also responsible for shipping all domestic trade show collateral for the Sales & Marketing team.
- **USA 800 - Kansas City, MO**
They control all fishing video & tournament guide fulfillment.

European fulfillment houses

- **BH&P Direct Mail Ltd. - United Kingdom.**
They are the primary European and Asian fulfillment house. This mailhouse services all Europe and Asia with exception of German speaking countries.
- **Presse u. Touristikdienst Nentwich - Germany**
They are the secondary European fulfillment house. This mailhouse services Germany, Austria, and Switzerland.

Generic Collateral:

Destination/Generic Brochure: A complete guide on every district, diving, fishing, events, attractions, meeting planners guide. A consumer receives this when dialing 1-800-FLA-KEYS or when requesting information on any district when calling a particular chamber. **Description:** 4" x 9" four-color • Weight: 2.9 oz. • First Class: .83¢ • Bulk: .27¢

Destination/Generic CD: An interactive CD that includes a button for the new Keys Video, a button for the Destination/Generic Brochure as a PDF File, a button & link that connects to the official TDC web site and a button for maps and screensavers. A consumer receives this when dialing 1-800-FLA-KEYS or when requesting information on any district when calling a particular chamber. **Description:** CD & CD Sleeve • Weight: 1.4 oz. • First Class: .60¢ • Bulk: .27¢

Conch Brochure: A brochure that gives a description of each district with specific attractions, map and chamber information. Available in English, Italian, Japanese, Portuguese, Spanish, Swedish, French, & German. **Description:** 4" x 9" four color • Weight: .7 oz. • First Class: .37¢ • Bulk: .27¢

Meeting Planners Guide: A guide featuring a beauty shot of participating properties, along with a description and room/facilities chart. Includes map and directional information. **Description:** 8.5" x 11" folded, four color • Weight: 1.7 oz • First Class: .60¢ • Bulk: .27¢

Florida Keys and Key West Film Commission Production Guide: A brochure highlighting location sites, attractions and permit information as well as accommodation and film production related business listings. **Description:** 5.5" x 8.5" four-color B&W inside • Weight: 3.0 oz. • First Class: .83¢ • Bulk: .26¢

District / Umbrella / Association Collateral:

Key West Attractions Guide: A membership listing of the attractions, shopping and visitor centers in Key West. Produced by the Key West Attractions Association. • Available in German and Italian. • A consumer receives this when dialing 1-800-LAST-KEY or 1-800-FLA-KEYS. Produced by Key West Attractions Association. **Description:** 4" x 9", 8 panels, four-color • Weight: .8 oz. • First Class: .37¢ • Bulk: .27¢

Key West Business Guild Brochure: Key West, "Where there's freedom, there is expression". The Gay destination. A consumer receives this when dialing 1-877-724-5247. **Description:** 4" x 9", 16 pg., four-color • Weight: 1.9 oz. • First Class: .60¢ • Bulk: .27¢

Fishing Tournament Guide: Complete list of Tournaments with date, location and director information. A consumer will receive both this guide and video when calling 1-888-FISH-KEYS. **Description:** 12" x 9", folded 3 panel, four-color • Weight: .4oz. • First Class: .37¢ • Bulk .27¢

Cultural Magazine: Magazine featuring a complete calendar of events. Includes articles on famous people who have visited the Keys as well as the visual & performing arts in the destination. A consumer will receive this guide when calling 1-800-FLA-KEYS. **Description:** 8.5" x 11", 16 pages, four-color • Weight: 2.1 oz. • First Class: .83¢ • Bulk: .27¢

Dive and Snorkeling Brochure: Includes information about diving and snorkeling in the Florida Keys and Key West. A consumer will receive this guide when they call 1-800-FLA-KEYS. **Description:** 4" x 9", 16 pages, four-color • Weight: .8 oz. • First Class: .37¢ • Bulk: .27¢

FULFILLMENT PROCEDURES

DOWN

LOAD FROM:

Chambers



TDC Office



Tinsley

TO:



SHIP TO:

Consumers

Trade

INTERNATIONAL

Cellett Travel Services, U.K.
and
Germany

Tinsley

TDC Office



International
Trade

International
Consumers

CALL TO ACTION

1-888-FISH-KEYS
Fishing Tournament Guide
& Fishing Video



Consumers

THE FLORIDA KEYS & KEY WEST
MONROE COUNTY TOURIST DEVELOPMENT COUNCIL
Come as you are®

There are countless destinations able to boast of sun and surf:
all with hotels, restaurants and various amusements.

For all that, there are few, if any, destinations, that compare with
the unique charm of the Florida Keys and Key West.

Nowhere does the spirit of live and let live manifest itself so eloquently
as it does here, in virtually every level of society. And at every level
of accommodations and amenities.

Early riser or night owl. Fisherman or sun worshipper. Diver or tippler.
Gourmet or gourmand. Art lover or souvenir hunter.
Seeker of luxury or connoisseur of funk.

"COME AS YOU ARE"

GENERIC MEDIA PLACEMENT

- **Consumer Magazines (Dedicated)**

1/2, 1/3, 1/4 and 1/6 page, four-color ads will be utilized to target to the upscale seasoned traveler, both domestically and internationally.

- **Consumer Magazines (FLA USA co-op)**

Co-op participation in consumer magazines and travel trade publications.

Florida International Travel Planner

Florida Official Travel Industry Guide

Florida Official Meeting Planner Guide

Official Florida Vacation Guide (North America Edition)

Official Florida Camping Directory

- **Consumer Magazine (Destination Co-op)**

Full, two-thirds and half page, 4 color ads with destination property participation

- **Internet/E-Marketing**

Yahoo / Google

Search Engine/Search Word listings - Overture

Banner advertising and Email Blasts on several magazines' web-sites as added value.

Opt-in direct marketing promotional efforts (Email Blasts to opt-in subscribers of NYTimes.com, USAToday.com)

Weather.com

FLAUSA.com

- **Television**

National Network Cable Thirty second spots on programs targeted to reach the demographic profile:

CNN/Headline News, The Travel Channel, The Weather Channel, History Channel, Home & Garden Television, MSNBC, CNBC, Bravo, Fox News, and The Food Network.

Thirty second TV spots will also be used In-State

- **Newspaper**

Ads placed in the travel sections of top feeder market newspapers, both in state and out of state. Allows for co-op opportunities for individual properties. Pick-ups on Friday Entertainment Sections will also be incorporated in within in-state newspaper efforts.

- **Travel Trade**

Ads to create awareness among travel planners both domestically and international and coincide with major travel shows.

- **Meetings/Groups/Conventions**

Both co-op and dedicated ads will be utilized to increase the potential for The Keys to become a location for small to mid-sized meetings and group travel.

- **Suburban Transit Advertising**

Car Cards and Three Sheet Posters will be utilized in the NY Market in Jan/Feb on Metro North, Long Island Railroad and NJ Path

All efforts will promote traffic to the Florida Keys and Key West web-site (www.fla-keys.com).

The publications on the media plan are selected based on the following criteria:

- Target audience
- Past performance
- Cost efficiency/cost per response
- Co-op ability

GENERIC PLAN

Magazines:

Coastal Living

- Circulation: 625,000
- Page 4 Color CPM - \$40.78

Male: 33%
Female: 67%
Median Age: 49.3
MHHI: \$125,400

Islands

- Circulation: 208,076
- Page 4 Color CPM - \$87.13

Male: 49.7%
Female: 50.3%
Median Age: 49.1
MHHI: \$120,800

Travel & Leisure – Eastern Edition

- Circulation: 525,000
- 1/3 Page 4 Color CPM - \$30.42

Male: 47.1%
Female: 52.9%
Median Age: 50.0
MHHI: \$121,000

Bride's

- Circulation: 385,291
- 1/2 Page 4 Color CPM- \$59.82

Male: 5%
Female: 95%
Median Age: 30.5
MHHI: \$49,029

The Knot

- Circulation: 325,000
- Page 4 Color CPM - \$48.68

Male: 20.0%
Female: 80.0%
Median Age: 27
MHHI: \$63,000

Southern Living

- Circulation: 1,913,969
- 1/3 Page 4 Color CPM - \$17.99

Male: 23.0%
Female: 77.0%
Median Age: 48.1
MHHI: \$78,995

Islands Destination Weddings & Honeymoons

- Circulation: 175,000
- 2/3 Page 4 Color CPM – \$45.78

Male: 32.0%
Female: 68.0%
Median Age: 32
MHHI: \$65,000

Art News

- Circulation: 82,131
- Page 4 Color CPM – \$36.53

Male: 41%
Female: 59%
Median Age: 48
MHHI: \$205,000

Conde Nast Traveler-Eastern Edition

- Circulation: 380,042
- 1/3 Page 4 Color CPM - \$25.74

Male: 43.0%
Female: 57.0%
Median Age: 46.2
MHHI: \$133,200

The New Yorker

- Circulation: 938,600
- 1/6 Page 4 Color CPM – \$14.15

Male: 50.4%
Female: 49.6%
Median Age: 51
MHHI: \$124,007

Texas Monthly

- Circulation: 301,418
- 1/3 Page 4 Color CPM – \$37.51

Male: 49.0%
Female: 51.0%
Median Age: 41.5
MHHI: \$73,000

Atlanta Magazine

- Circulation: 66,516
- 1/2 Page 4 Color CPM - \$47.82

Male: 33.0%
Female: 67.0%
Median Age: 49.5
MHHI: \$133,200

AAA Going Places

- Circulation: 2,254,278
- 1/2 Page 4 Color CPM – \$7.87

Male: 40.0%
Female: 60.0%
Median Age: 43
MHHI: \$59,500

Bon Appetit

- Circulation: 1,302,311
- 1/3 Page 4 Color CPM – \$18.55

Male: 28.2%
Female: 71.8%
Median Age: 45.8
MHHI: \$85,161

Birding

- Circulation: 20,001
- 1/3 Page 4 Color CPM – \$34.60

Male: 64.0%
Female: 36.0%
Median Age: 55
MHHI: \$95,500

AAA World

- Circulation: 2,098,000
- 1/6 Page 4 Color CPM – \$3.23

Male: 44%
Female: 56%
Median Age: 53.3
MHHI: \$90,500

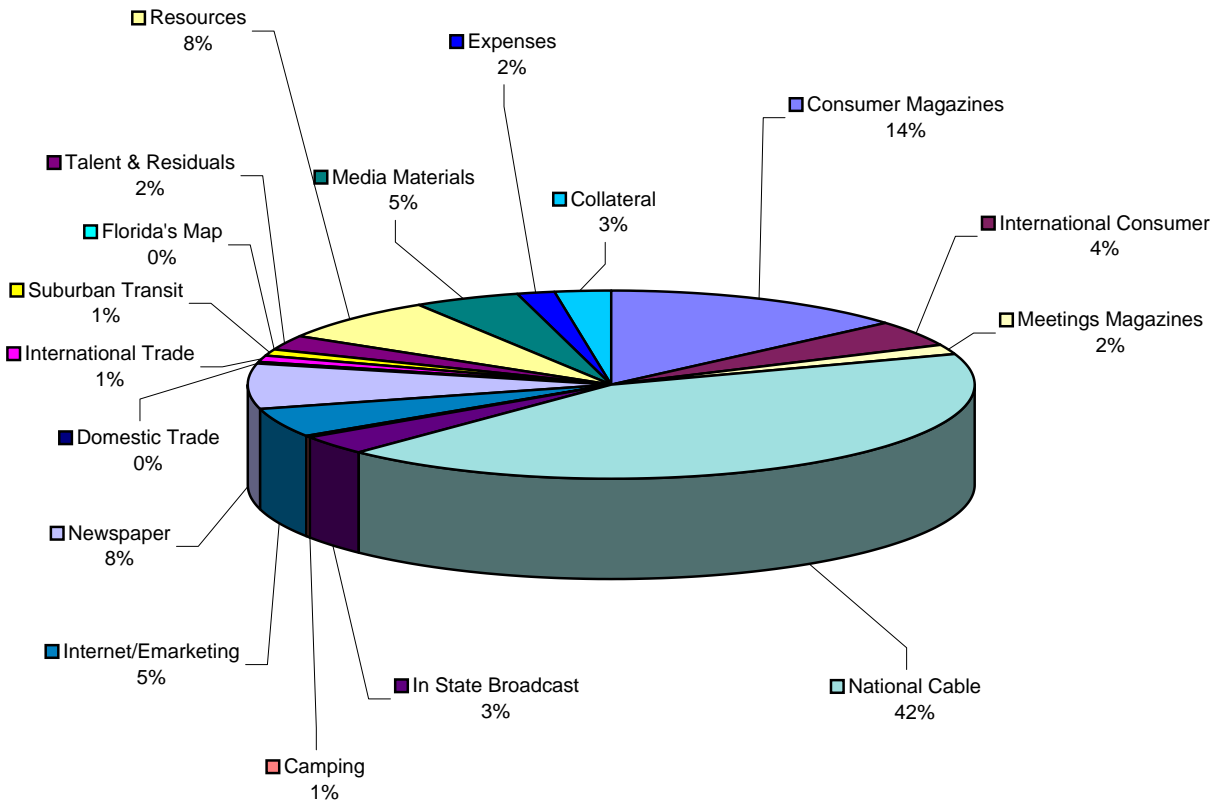
Raleigh Metro Magazine

- Circulation: 40,000
- 1/2 Page 4 Color CPM – \$79.95

Male: 48%
Female: 52%
Median Age: 43
MHHI: \$126,000

Source: MRI Fall 2004
2004 - Monroe Mendelsohn,
Subscriber Study 2004,
Mark Clements Subscriber Study 2003
(Art News)

Generic 2005-2006 Media Spending by Category



\$3,180,000

21

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-24

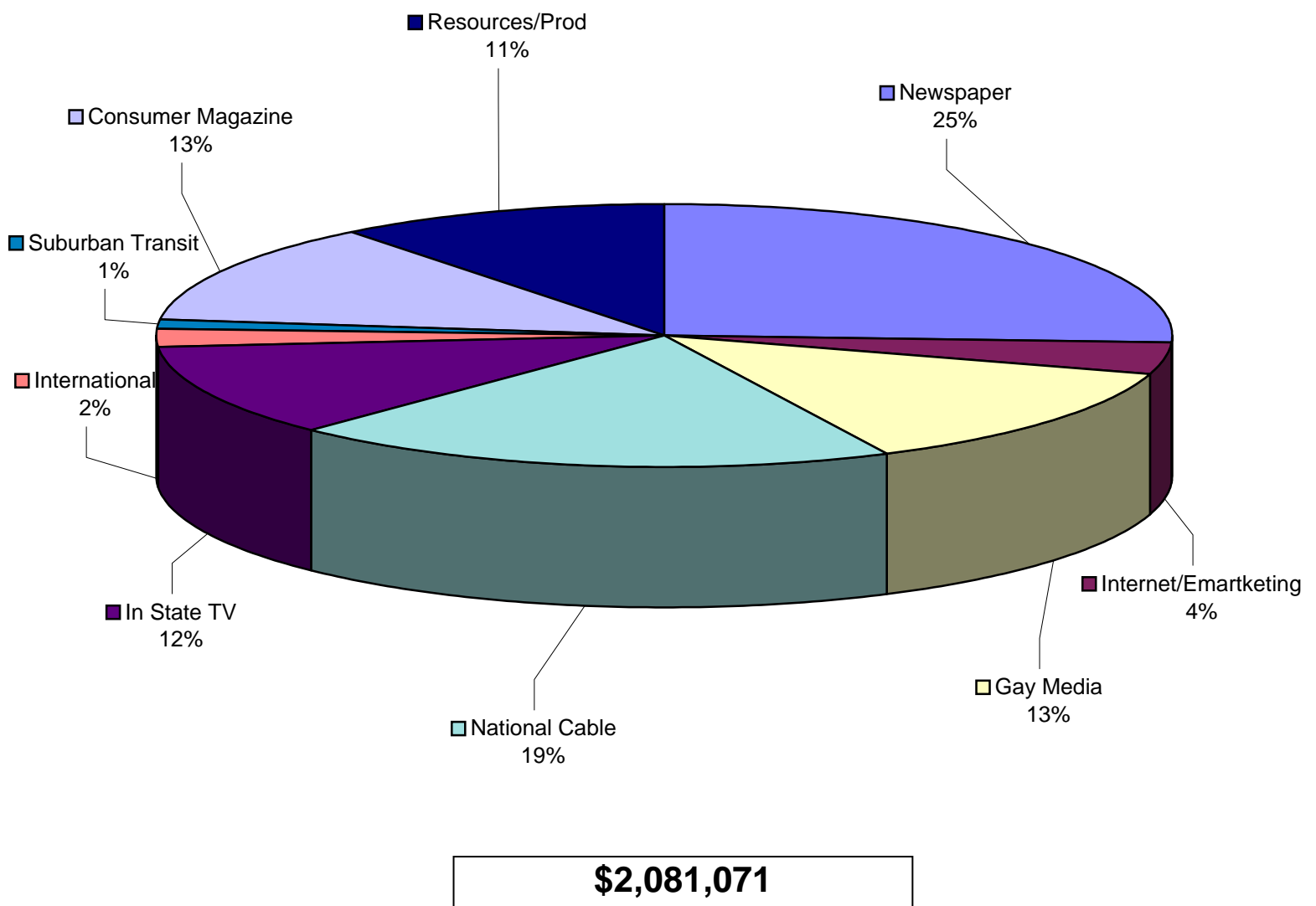
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the commonplace
KEYWEST®

"It is a curious place this Key West. Closer to Havana
than to Miami. The southernmost city in the U.S.
and by far the most unique."

DAC 1

2005-2006 Media Spending by Category



THE FLORIDA KEYS & KEY WEST DAC1 - KEY WEST		2005/2006 DAC1-KEY WEST MEDIA PLAN												To Be Ordered Media =		Ordered Media =	
2005/2006 Media Plan		* Labor Day (9/4) * Memorial Day (5/29) * Independence Day (7/4) * Labor Day (9/4)															
		* Grand Prix (Feb) * Grand Prix (Feb) * Grand Prix (Feb)															
		* Columbus Day (10/12) * Columbus Day (10/12) * Columbus Day (10/12)															
		* Thanksgiving (11/24) * Thanksgiving (11/24) * Thanksgiving (11/24)															
		* Christmas (12/25) * Christmas (12/25) * Christmas (12/25)															
		* New Year's (1/1) * New Year's (1/1) * New Year's (1/1)															
		* Mardi Gras (2/20) * Mardi Gras (2/20) * Mardi Gras (2/20)															
		* Spring Break (3/24-3/30) * Spring Break (3/24-3/30) * Spring Break (3/24-3/30)															
		* Summer Break (6/1-6/10) * Summer Break (6/1-6/10) * Summer Break (6/1-6/10)															
		* Labor Day (9/4) * Labor Day (9/4) * Labor Day (9/4)															
		* Memorial Day (5/29) * Memorial Day (5/29) * Memorial Day (5/29)															
		* Independence Day (7/4) * Independence Day (7/4) * Independence Day (7/4)															
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		* Independence Day (7/4) * Independence Day (7/4) * Independence Day (7/4)															

THE FLORIDA KEYS & KEY WEST DAC1 - KEY WEST										2005/2006 Media Plan										2005/2006 DAC1-KEY WEST MEDIA PLAN										To Be Ordered Media =										Ordered Media =																																																																																									
* Columbus Day (10/10)										* Thanksgiving (11/24)										* Grand Prix (10/1)										* Memorial Day (5/28)										* Labor Day (9/4)																																																																																									
* Monday thru Sunday weeks										* Tuesday (11/22)										* Pies Day (2/20)										* Easter (4/18)										* Met Labor Season (7/25-7/28)																																																																																									
* October 30/31										* Halloween (10/25)										* Christmas (12/25)										* New Year's (1/1)										* MLK Day (1/16)										* Spring Break (3/15-17)										* Summer Break (6/15-17)										* Labor Day (9/4)																																																											
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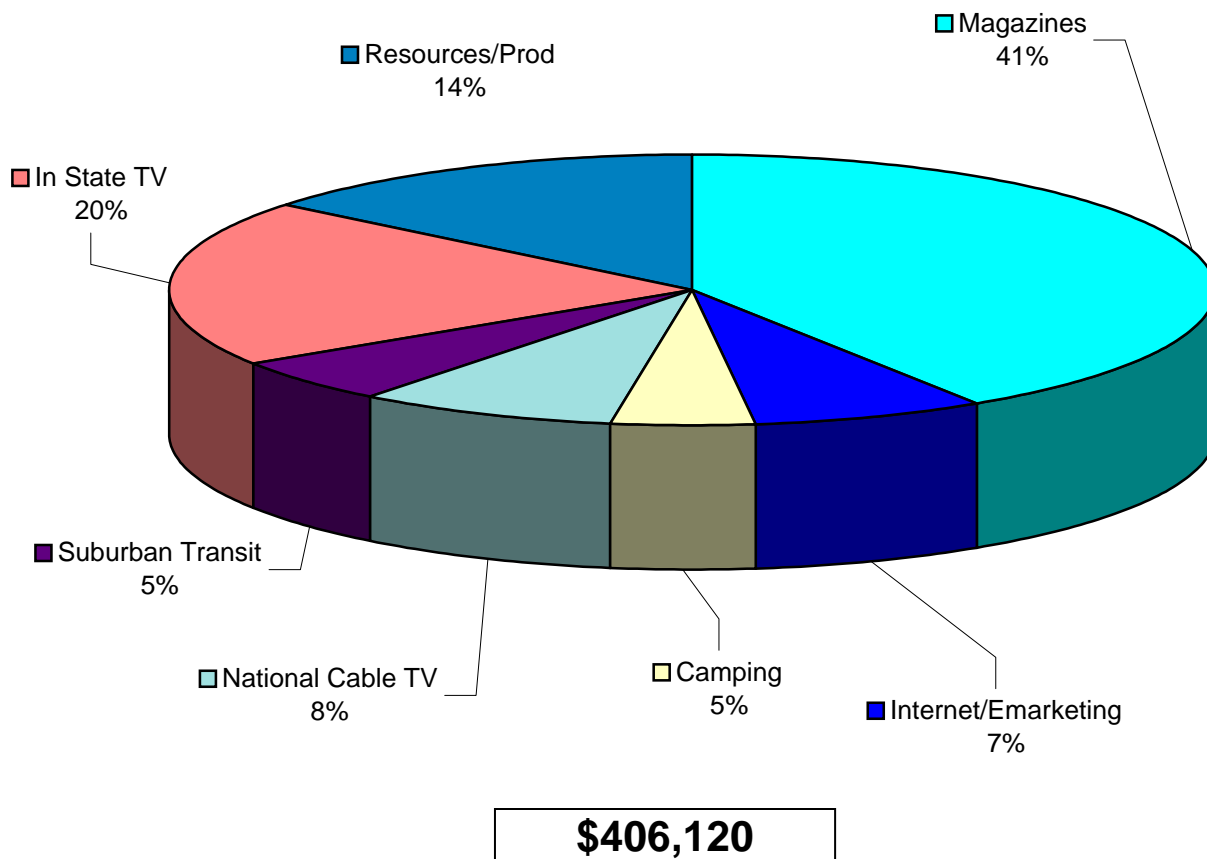


"The islands and islets of the Lower Keys are a natural escape for travelers and exotic species of wildlife alike. Sun-filled days and quiet nights await you in this tropical American paradise."

Camping • Eco-tourism • Diving • Fishing

DAC 2

2005-2006 Media Spending by Category



[illegible]

Monroe County Tourist Development Council 2005-2006 Marketing Plan

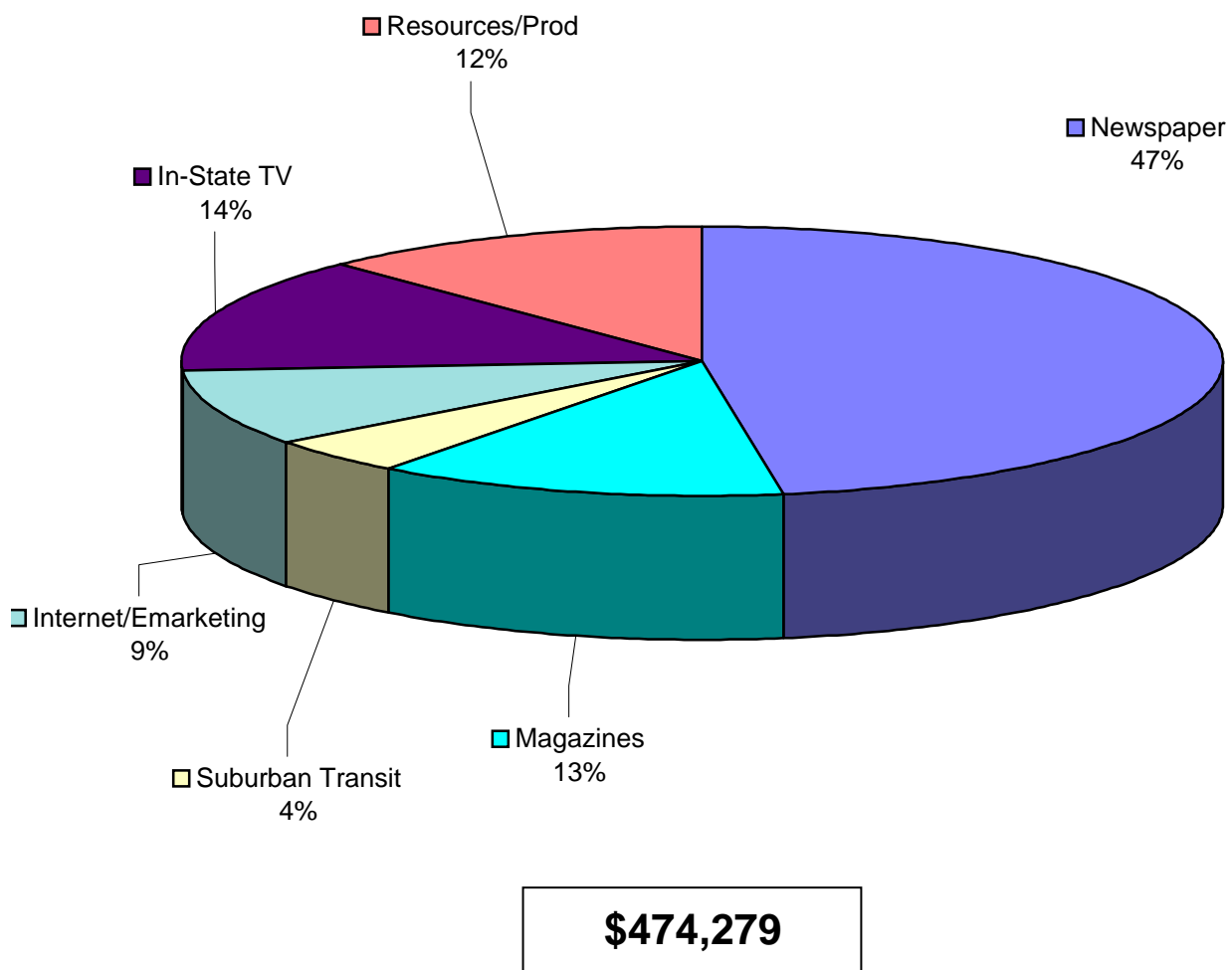
2005/2006 DAC2/BIG PINE KEY & LOWER KEYS MEDIA PLAN				To Be Ordered Media =		Ordered Media =	
THE FLORIDA KEYS & KEY WEST DAC2 - LOWER KEYS				* New Lobster Segment (728/729)			
2005/2006 Media Plan				* Memorial Day (5/29) * Ind Day (7/4)		* Labor Day (8/4)	
				* Grand Prix (6/4) * Free Day (7/20)			
				* Columbus Day (10/10) * Thanksgiving (11/23)			
				* Monday thru Sunday weeks			
				* New Year's (1/1) * MLK Day (1/16)			
				* Easter			
				* Grand Prix (6/4) * Free Day (7/20)			
				* Columbus Day (10/10) * Thanksgiving (11/23)			
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				* Easter			
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				* Easter			
				* Grand Prix (6/4) * Free Day (7/20)			
				* Columbus Day (10/10) * Thanksgiving (11/23)			
				* Monday thru Sunday weeks			
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				* Easter			
				* Grand Prix (6/4) * Free Day (7/20)			
				* Columbus Day (10/10) * Thanksgiving (11/23)			
				* Monday thru Sunday weeks			
				* New Year's (1/1) * MLK Day (1/16)			
				* Easter			
				* Grand Prix (6/4) * Free Day (7/20)			
				* Columbus Day (10/10) * Thanksgiving (11/23)			
				* Monday thru Sunday weeks			



"Some undeniable yearning in the human spirit knows
the restorative powers of peace, quiet and warmth.
In the Keys we will be at home. In Marathon we are in the heart
of the Keys, and you can even fly in."

DAC 3

2005-2006 Media Spending by Category



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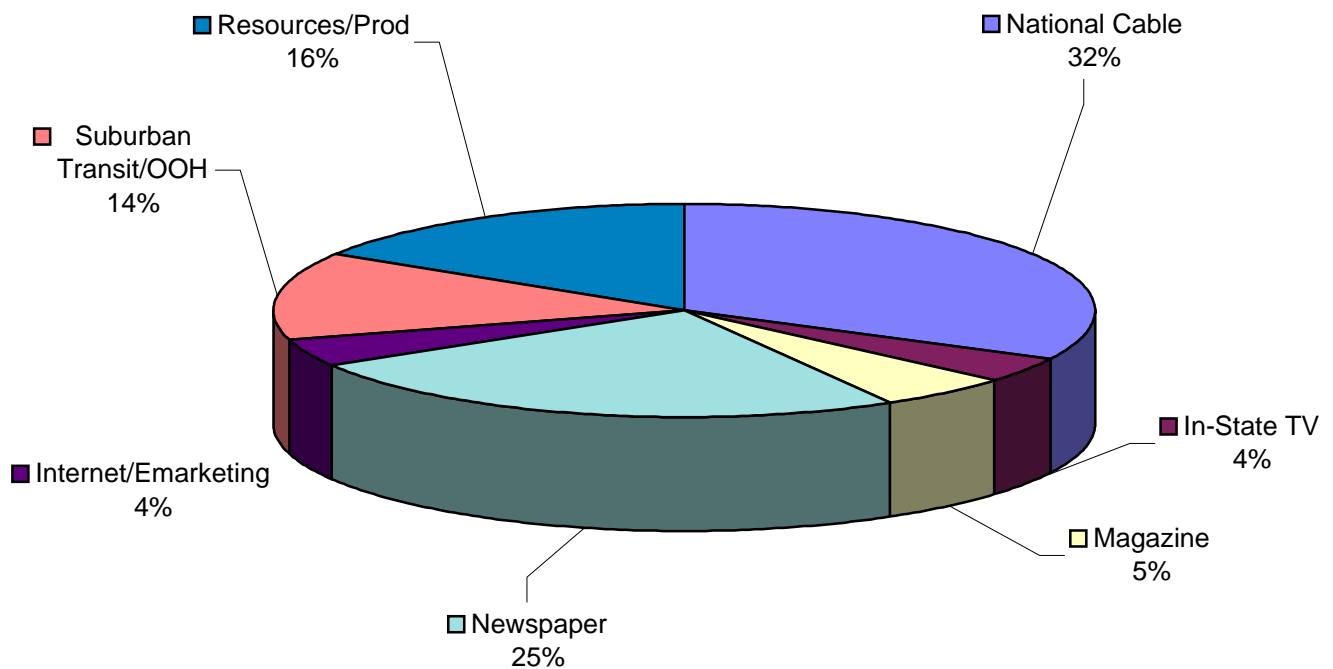
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"Islamorada's past is checkered by a romantically rag-tag lot of Spanish explorers, Calusa Indians, itinerant fishermen, pirates, sailors, salvors, treasure hunters, Bahamians, sybaritic expatriates from up North and people who just generally want to escape."

DAC 4

2005-2006 Media Spending by Category



\$526,844

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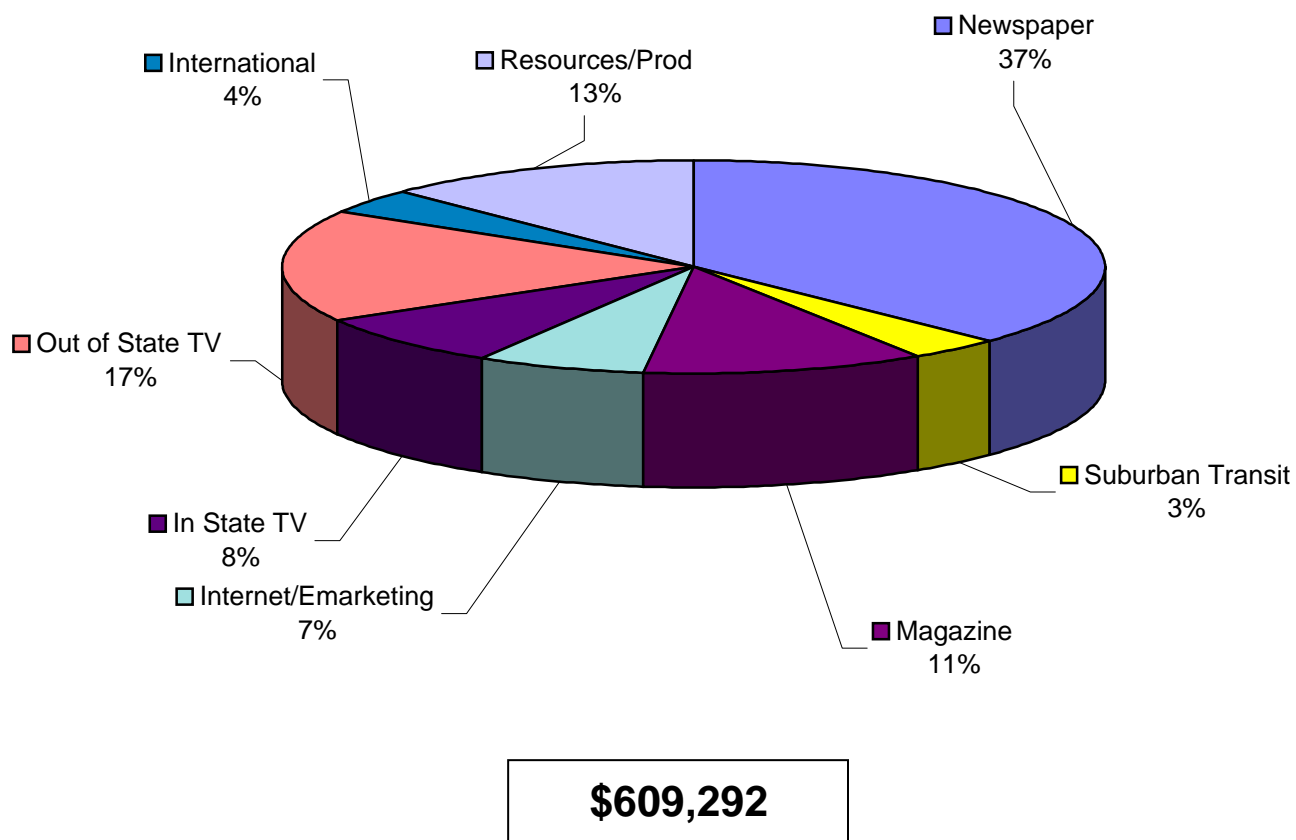
KEY LARGOSM

Stay down longer in The Florida Keys

"There's something magical about Key Largo. The mere mention of it conjures up romantic images of Bogey & Bacall, and makes you want to come down and create some memories of your own."

DAC 5

2005-2006 Media Spending by Category



[illegible]

2005/2006 DAC5/KEY LARGO MEDIA PLAN												To Be Ordered		Ordered Media																																	
												* Min. Order Section (728/729)																																			
												* Grand Prix (8-3)																																			
												* Memorial Day (5-29)		* Labor Day (9-4)																																	
												* Easter																																			
												* New Year's (1-1)																																			
												* M.K. Day (1-15)																																			
												* Thanksgiving (11-24)																																			
												* Christmas (12-25)																																			
												* Halloween (10-31)																																			
												* Columbus Day (10-10)																																			
												* Vespers (11-15)																																			
												* President's Day (2-20)																																			
												* Mother's Day (5-14)																																			
												* Father's Day (6-19)																																			
												* Independence Day (7-4)																																			
												* Labor Day (9-4)																																			
THE FLORIDA KEYS & KEY WEST DAC 5 - KEY LARGO 2005/2006 Media Plan												* Monday thru Sunday weeks * Columbus Day (10-10) * Halloween (10-31) * Thanksgiving (11-24) * Christmas (12-25) * New Year's (1-1) * M.K. Day (1-15) * President's Day (2-20) * Mother's Day (5-14) * Father's Day (6-19) * Independence Day (7-4) * Labor Day (9-4)												* Grand Prix (8-3) * Memorial Day (5-29) * Easter * New Year's (1-1) * M.K. Day (1-15) * Thanksgiving (11-24) * Christmas (12-25) * Halloween (10-31) * Columbus Day (10-10) * Vespers (11-15)												* Min. Order Section (728/729) * Grand Prix (8-3) * Memorial Day (5-29) * Easter * New Year's (1-1) * M.K. Day (1-15) * Thanksgiving (11-24) * Christmas (12-25) * Halloween (10-31) * Columbus Day (10-10) * Vespers (11-15)											
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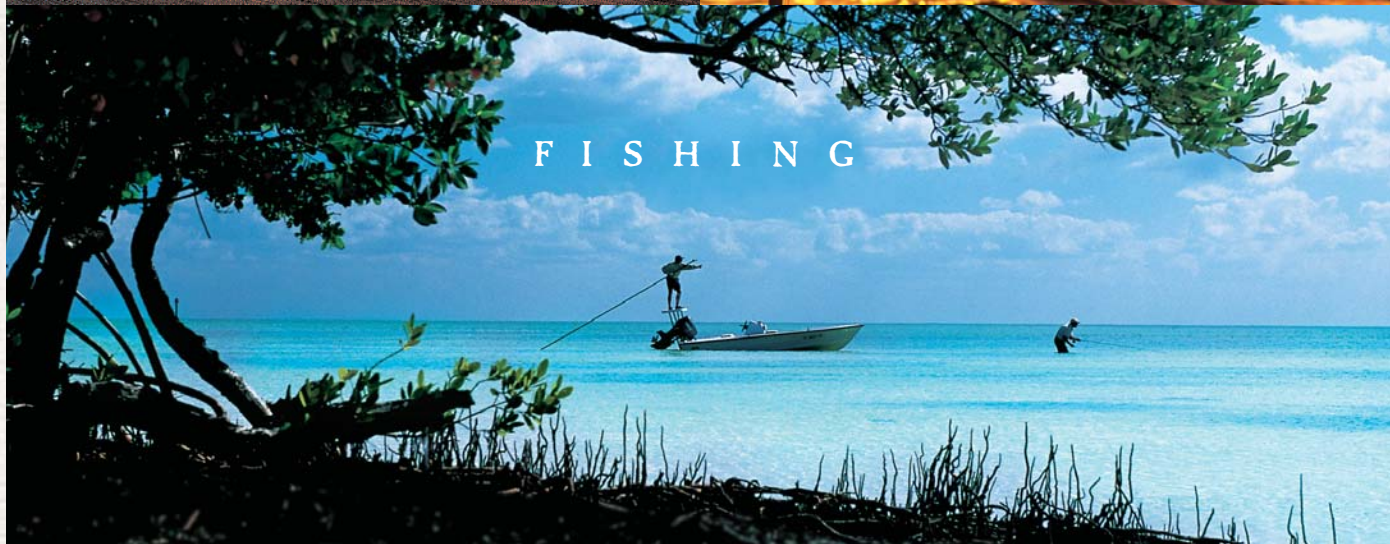
C U L T U R A L



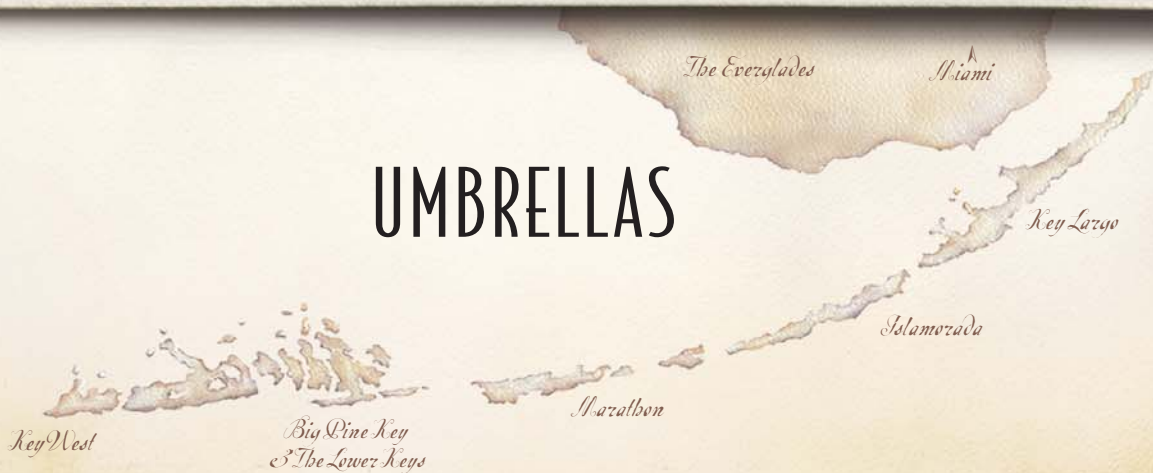
D I V I N G



F I S H I N G



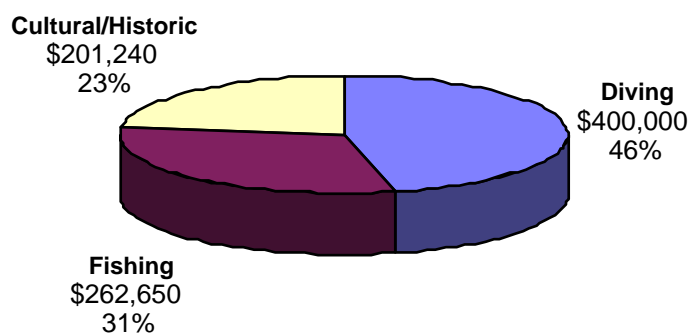
UMBRELLAS



UMBRELLAS

Consumer Magazines: Targeted specifically to cultural/historical, diving and fishing markets.

2005 - 2006 Umbrella Spending



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THE FLORIDA KEYS & KEY WEST FISHING UMBRELLA										2005/2006 FISHING UMBRELLA MEDIA																												ordered Media *																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																													
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Measurability

- a) Internet click throughs will be monitored and tracked monthly with placement of advertising.(Recommend BPA auditing)
- b) Inquiries from trade/meeting publication advertising produces leads to the sales division and directly to lodging industry. The sales division will track these.
- c) VIS phone calls (area of dominant influence) will be traced to media placement.
- d) We will track the geographic and demographics of potential visitors to see if advertising is hitting the market.
- e) Conversion studies will be developed by the TDC Market Research Department to measure the effectiveness of selected media to actual visits.
- f) Specific URLs will be placed on select print media at various times throughout the year to gauge consumer response to advertising.

Different tracking opportunities will come up during the fiscal year. We will keep all opportunities open to take advantage of these methods.

J. SALES

Introduction

The sales team is comprised of individuals who work primarily in the field, within identified existing markets and potential growth markets. The sales staff interfaces, one-on-one, with the travel trade, which includes travel agents, tour operators, incentive planners, meeting planners and receptive operators. The staff also works with state and regional tourist bureaus, CVB's and ground, air and sea travel specialists and direct consumer shows, promoting the Florida Keys & Key West as a destination.

Though the sales team effort acts in concert with the efforts of advertising, public relations, and research, the sales effort is specialized and uses methods unique to the field of sales. These methods will be discussed in greater detail within the body of this sales plan for fiscal year 2005-2006.

Objectives

1. To create and maintain a strong level of excitement, product knowledge and demand for the destination among travel trade professionals and consumers.
2. To insure that these travel trade professionals act as an extended sales and marketing arm by promoting the Florida Keys and favorably influencing consumer destination choices.
3. To provide the trade and the lodging industry assistance and professional support utilizing all tools, personal skills, venues and methods available to us in an effort to achieve profitable end results for the destination.
4. To facilitate and liaise booking activity between the lodging/attractions industry and the travel trade buyers of product.
5. To interact with sales and marketing personnel throughout the Keys within the local lodging/attractions industry and participate in idea exchange, seek feedback regarding market activity and garner industry support in selling the destination.
6. To maintain a strong alliance with, and act in concert with, our industry partners to project a unified sales force image among the travel trade and allow for cross selling and/or referrals within Monroe County.
7. To research, target and implement sales and promotional activity in cultural, historical and soft adventure travel markets both domestically and internationally.

8. Promote more travel to the destination during Aug-September time period.
9. Promote length of stay in domestic and international markets.
10. Promote the diversity of alternative lifestyle markets to the destination.
11. Position the Florida Keys as a soft adventure destination.

Goals

1. Increase domestic sales efforts in targeted, specialty consumer markets.
(i.e. bridal, gay and lesbian, affluent mature and soft adventure markets)
2. Produce quarterly electronic direct sales efforts to meetings and incentive planners.
3. Establish a multi lingual electronic newsletter on international web page.
4. Establish UK and German home pages on TDC web site.
5. Increase sales efforts in secondary travel markets.
6. Develop a domestic “own a city” campaign targeting the Washington, DC Beltway area.
7. Establish an inventory of ‘self-catering’ products to travel trade.
8. Develop one international and one domestic “see for yourself” campaign to the region.

Staff Responsibilities

Director of Sales	Department administration. Oversees sales staff activity and reporting in both international and domestic markets as well as specialty markets, i.e. dive, fishing, and gay travel. Oversees activity of sales offices based in the UK and Germany. Develops and implements annual sales plan under budgetary guidelines. Liaises with the advertising agency, public relations agency, research department, fulfillment houses in Key West, the UK, Germany, Visit Florida, Visit USA Committees, trade professionals and journalists.
Sales Manager	Responsible for implementing sales plan activity for domestic travel targeting feeder markets, US and Canada. Works with Domestic Tour operators, consumers and retail travel agents. Focuses primarily on Northeast, Midwest, Central Atlantic, Southern Atlantic, and Florida.
Sales Manager	Meetings & Conventions market. Works with corporate, national and state association planners and incentive planners to generate group business for the Keys. Provides additional assistance with retail travel agents and consumer events. Handles DEMA in conjunction with Dive Umbrella.
Sales Manager	International Market. Responsible for implementing sales plan activity in Europe, Latin America and Japan. Provides support for retail agents, tour operators, and US based receptive operators. Works closely with sales offices in the UK and Germany in the implementation of our international sales plan.
Sales Manager	(Part time) Responsible for implementing sales plan activity in gay market. Participates in trade and consumer oriented exhibits and workshops targeting gay and lesbian travelers and agencies specializing in gay and lesbian travel programs.
Sales Manager	(Part time) Responsible for planning, coordinating and staffing a destination booth at specialty market expos as outlined by the Director of Sales.
Cellet Travel Services, Ltd.	Maintains Florida Keys dedicated phone line for United Kingdom, Scotland, and Ireland. Participates in tradeshow, and provides support for trade professionals and consumer interests. Coordinates fulfillment orders with fulfillment house in the UK. Assists in sales missions and initiates sales calls. Liaises with McCluskey & Associates PR.

Cellet Travel Services, Ltd. Maintains Florida Keys dedicated phone line for Germany, Austria, Switzerland. Participates in tradeshow, and provides support for continued trade professionals and consumer interests. Coordinates fulfillment orders with fulfillment house in Frankfurt. Assists in sales missions and initiates sales calls with the assistance of a German sub-agency called Get It Across Marketing. Also liaises with McCluskey & Associates PR

Sales Assistant Provides administrative support for all sales staff. The sales staff is responsible for planning, organizing, and executing sales activities as they relate to trade shows, sales missions, presentations, familiarization trips (fam) , sales calls and coordinating and encouraging industry participation.

The sales staff provides on going customer support through telemarketing, trade fulfillment, sales calls, site visits, presentations, electronic promotions, familiarization trips and general assistance. Each manager provides a report following each venue and organizes all leads generated as a result of a sales promotional event or trip for processing by the sales assistant and forwarding to the industry for follow-up. This year the staff will focus on cultural, historical and soft adventure based tourism promotions within all of our methods of sales to the travel trade industry.

The sales staff reports to the Director of Sales and the Director of Sales reports directly to the Marketing Director of the Monroe County Tourist Development Council.

Methods of Sales

Trade Shows - Organized and established exhibits domestically & internationally. Normally the format is standard full booth (10' X 10') or (8' X 10') pipe and drape, trade table (jr. booth), counter top (approx. 3 feet counter space only), or table top (6 foot table). In some cases, the booth would be customized to accommodate the size of our Keys delegation. Trade shows provide a gathering of travel brokers/press who take the opportunity to meet with exhibitors (known as suppliers) and gather pertinent information with regards to destinations, accommodations, attractions, airlines, rental cars, cruise ships, or any travel industry product. They provide a very effective means of making contact with a significant number of interested buyers within a few days time or the length of the exhibit. Normally, trade shows are brisk in activity and buyers seek out exhibitors they are interested in doing business with. Trade shows are attended by travel agents, tour operators, receptive operators, meeting planners, journalists, and consumers depending on the show format. Where possible, we exhibit in the Visit Florida section. Tradeshow provide an opportunity to meet new customers and renew personal relationships with existing customers. They also provide an opportunity to discuss any problems a client might be having or address specific needs of that client. Trade shows provide a venue for many introductions to the industry participants and even in participant absence, an opportunity to record leads for follow-up after the show. Trade shows are essential in the travel industry. An inordinate amount of business is booked worldwide either right on the spot or as a result of follow-up.

Sales Missions - Sales Missions are comprised of an organized delegation of sales people of a common grouping who travel as a group to a specific geographic area to meet face to face with customers. Some common activities of a sales mission are appointment calls taking place within the client's office environment to discuss the various products represented. The mission may also include hosted breakfast/lunch/reception/dinner training seminars and product presentations to the trade. Typically, this format is by invitation only to pre-qualified agents or meeting planners. A hosted reception is often appropriate and provides a casual atmosphere in which to network, but with the clear objective being product exposure. Missions are commonly organized by Visit Florida and open to statewide participation. Many times, we organize our own Keys mission with Keys industry. Both are very valuable venues. Almost without exception, the trade customers we meet with are genuinely responsive, courteous, interested and even grateful.

"Destination Days" occur when representatives from a destination set up a tradeshow environment within a tour operator, airline reservation center or incentive planners office. Presentations are given to the sales/reservations agents on how to promote our destination to their clients and consumers, and to update them on new product and current events associated with the travel industry.

Sales Calls - Sales calls are comprised of visits to travel trade offices where an appointment is held, or in a restaurant where the destination representative invites the point of contact to share a meal. Sales calls can be executed by an individual or in a small grouping of sales people. Sales calls are effective and the customer is usually pleased that the sales person has taken the time to visit them personally and provide materials such as brochures, videos, etc. Though their agencies and offices are most often busy and hectic with the day's transactions, they are usually hospitable and will make time for you with few exceptions. The downside of sales calls is that it can sometimes be difficult to see more than 3 or 4 planners daily depending on the length of the call. Sales calls are the most effective method of establishing or maintaining a relationship with a valued customer.

Familiarization Trips - Familiarization trips (fam) are the optimum opportunity to showcase your product first hand. These trips are organized and attendees include travel trade professionals who have been qualified beforehand. The average size is 15 -20 participants but can vary. They will generally have a local escort from the tourist bureau or a hotel may choose to solely organize their own fam. Fams are generated from a variety of sources: Airlines, tour operators, state and regional tourist bureaus, travel agencies, corporate hotel chains, etc. Fams are golden opportunities to help these professionals sell your product by experiencing it firsthand. We in the Florida Keys get very creative with our fams and follow the philosophy that we do not want the participants to spend all of their time inspecting hotels, but to experience what the destination itself has to offer in the way of attractions, activities, gardens, museums, watersports, nature, architecture, history, etc. Hotels have the opportunity for exposure by hosting meals and doing brief presentations and/or providing complimentary lodging. All meals, accommodations and activities are sponsored either by the lodging/attractions industry or by the TDC, resulting in no significant costs to the fam participants. Fams are most always a very positive experience. The downside is dependency on fair weather, securing lodging during peak occupancy periods and fams are usually short 1 - 3 nights. The participants cannot see or experience all there is. Fam opportunities arise frequently throughout the year.

Direct Mail - Direct mail refers to a specific mail campaign offering a special promotion, or it can be as simple as following up with fulfillment and a letter to a set of leads. Direct mail can be a tickler, a reminder to the trade to keep your product in the forefront. Direct mail can be targeted to any market, trade or consumer. It can be a very effective tool.

Electronic Marketing- Electronic promotion of our destination using various internet media including: e-newsletters, brochures, postcards and online sales presentations. E-marketing is cost effective, reaches an audience that staff would not be able to physically visit, available across every time zone during business hours, is targeted and trackable. This is an excellent follow up tool to sales missions, trade shows and keeps established clientele informed on destination updates. It can also be used as an educational source for meeting planners, travel agents and tour operators.

Telemarketing - Telemarketing is any sales activity that takes place over the phone. It can be proactive and soliciting or simply responsive and reactive providing necessary sales support. The TDC sales office, the media hotline at SNA, the Chambers' VIS lines, and the dedicated UK and German lines are the telemarketing centers of our organization.

Co-operative Programs - The sales department offers many co-operative delegate programs to the Keys tourism industry as does Visit Florida. Co-op booth space provides a more affordable opportunity to exhibit than to contract independently with the show organizers. Many show regulations provide for this type of arrangement, but some organizers do not. Keys industry participants join in the destination booth and have the opportunity to sell not only the destination but their product as well. Fees vary from show to show. We have had great success with this approach throughout the recent years. Additionally, we frequently offer brochure distribution opportunity when it is not feasible to offer delegate participation.

Sponsorships - We are sometimes approached for sponsorship support. A sponsor normally funds a function or event in return for market exposure of some sort. Sponsorships may range from a small-scale activity such as a coffee break to a large-scale event such as a trade function sponsor. All sponsorship participation must be evaluated by its potential benefits.

Lead Generation - The sales staff accumulates leads as a result of almost every effort we make, whether it is sales calls, missions, trade shows, or incoming office inquiries. The leads are passed along to the industry either via e-mail with the post trip report or via fax. Timely processing and distribution of leads is a critical component. The leads may vary in quality, but each lead is distributed as a result of a direct request from a travel professional. Sometimes this includes consumers as well.

Follow-Up - Once leads have been obtained and distributed to the industry, follow-up to both our industry partners as well as to the travel trade is essential in determining the results of a sales effort. Lead follow up can be accomplished through different methods including: contacting travel trade to determine action steps taken as a result of our meeting, contacting meeting planners to determine how many properties responded to their request for proposal or contacting trade partners to determine booking volume as a result of a training or sales call to a reservation call center.

INTERNATIONAL MARKET

OVERVIEW

After four years of sluggish growth, the international market may be returning to the States in record-breaking numbers. There are several factors impacting this forecasted double-digit growth with the most influential being the favorable exchange rate. The Pound Sterling is remaining very strong against foreign currencies, and the EURO remains fairly strong. Other positive influences include: the four year pent up demand, increased transatlantic lift, the absence (as of this writing) of any dire world event, and a concentrated effort by TIA (Travel Industry Association of America) to re-position the United States as a welcoming destination to foreign travelers.

Throughout the course of the fiscal year, members of the international travel trade have expressed their enthusiasm and positive booking paces for inbound travel to our destination. Although forward booking paces have not settled into a predictable pattern, travel trade officials have experienced a slight return to a more manageable, earlier booking pace, which indicates a confident, long haul consumer. This confident, repeat customer is looking for unique, adventurous experiences on their holidays which will effect how we market and position ourselves to the international traveler.

The UK and Germany continue to be our top inbound overseas countries of origin. For the traditional Florida holiday maker, the lure of warm weather, sun, beaches and theme parks will continue to draw visitors from these two regions. However, with the strong marketing campaigns generated from the 'Great American West' and the National Parks service, we need to continue to position ourselves as a completely unique Florida experience. Soft adventure activities, interacting with the natural habitat, and unique, cultural exchanges experienced through art, food, music, etc. will all combine to set the Keys apart from your typical Florida vacation.

Other areas in the European Union are beginning to gain confidence in traveling to America after a long drought. They are viewing Florida as the perfect destination for their first trip to America after almost four years. These countries (Scandinavia, Baltic States region, Italy, etc.) all take their vacations in late July through mid September which can help us overcome the deficits we predictably face during those late summer months.

The introduction of self-catered products (condos, villas, apartment style units) will encourage longer lengths of stay and benefit the local infrastructure as visitors will have more time to experience the destination as a whole vs. just the major highlights. This also develops stronger relationship ties between the travel trade and destination marketers as we present new ways of growing their business and at the same time benefiting the destination during need times.

Profiles

Resources used in the information provided below includes Visit Florida Research Department, the Travel Industry Association of America, the U.S. Commercial Service, Visit USA Committees and the various U.S Embassies

I. EUROPE

BELGIUM

International Traveler Profile

- U.S. continues to be the top long-haul destination
- California, New York and Florida are the favored areas to visit
- Average length of stay is 14 nights, and a majority choose fly/drive holidays
- Average age of long haul traveler is 45-54 years old
- Belgians travel from June through mid-September
- Belgian travelers are independent, seeking tailor-made trips.

Travel Preferences and Trends:

- The potential Belgian traveler will research about a possible destination in the US before making their travel plans.
- Belgian incomes allow for a high level of disposable income to be spent on long-haul travel
- Seeking more “Adventure Vacations” vs. strictly beach activity

Economic Considerations and Political Trends:

- Belgium economy remains stable, with Brussels being the capital of EU.
- Four main airlines AA, CO, Delta and UA offer daily flights to the US.
- TUI and Thomas Cook (Belgian Tour Operators) control 80% of Belgian travel market

FRANCE

International Traveler Profile:

- US remains top choice among long haul destinations
- 70% of visitors choose fly/drive vacations, as they are individualized
- 55% of visitors come from Paris and its surrounding regions
- Average age is 25-45 years old
- Average length of stay is 15 days for fly/drive market
- Vacations usually taken between June 30 and September 15
- Trend is toward more “natural destinations and exploration vs. theme parks
- The French are attracted to the sea, beaches, and sun which explains Florida’s popularity
- The French are also very fond of culture, history and food
- New York, Florida, and California remain the preferred destinations
- The French customer is generally a repeat visitor

Travel Preferences & Trends:

- Today's generation of travelers is comfortable traveling in English-speaking areas
- Bed and breakfast stays are becoming increasingly popular, as the French are looking for a more personal interaction with the local community.

Economic Considerations and Political Trends:

- Market indicators project continued growth in the French market. The US is expected to continue its designation as first choice in long haul travel
- The value of the EURO coupled with low airfares will encourage the French to travel abroad
- Tour operators are now selling directly to the consumer, thereby passing on the savings and omitting the retail agent
- However, unemployment is very high

GERMANY, AUSTRIA AND SWITZERLAND

International Traveler Profile:

- Florida remains the favored U.S. based destination
- Average length of stay is 12 days
- Main travelers to Florida are now adults w/o children (93% vs. families 6.8%)
- EURO vs. USD making the U.S. a value destination
- Shoulder seasons may see increase in visitors due to profile shift from families to couples
- Reasons for traveling: weather, climate, beaches, nature, wildlife
- Top Interest for the Florida Keys: dolphin interaction; Hemingway; snorkel/scuba diving

Travel Preferences and Trends:

- Booking cycles fluctuating; surge in long term bookings seen this fall benefits the consumer with more product availability and savings incentives. Surge in short term bookings predicted when second print runs of summer 2005 catalogues hit the stands and specials are advertised.
- Internet bookings not effecting tour operator business. Represent less than 9% of all long haul travel business.
- Greatest growth potential is in "young, active senior" market (over 50) or adults without children
- Shoulder seasons may see increase in visitors due to profile shift from families to couples
- Length of stay shortened with propensity towards more frequent, shorter breaks.

Economic Considerations and Political Trends:

- Long haul bookings stimulated by favorable exchange rate and three year pent up demand
- Stagnant economy may slow double digit growth in long haul travel.
- AA, CO and Delta now offering daily non stop service from Frankfurt, Berlin and Hamburg to the United States which may ease concerns regarding sold out flights during peak travel periods.
- Germany's unemployment is very high

IRELAND

International Traveler Profile:

- The U.S. is the most popular long-haul holiday destination
- Ireland represents one of the fastest-growing markets for U.S. based travel and tourism products
- Florida, New York and California remain the most popular destinations
- Average length of stay is 16.9 nights in the U.S.
- Irish visitors (vs. EU counterparts) are more likely to include children on their trip

Travel Preferences and Trends:

- Prefers sunny, warm destinations
- Destinations “slightly off the beaten path” becoming very popular
- The United States earns one half of Ireland’s long haul travel market
- Increased lift from Shannon and Dublin airports may encourage more travel to the States
- Short term bookings becoming more normal; leisure travel booked average 2-6 weeks out

Economic Considerations:

- Ireland has the fastest growing economy in the European Union
- Irish passenger travel to the U.S. slated to surpass previous records by 11% this year!
- U.S. represents good value to the Irish traveler.
- AA, CO AerLingus and charter flights increasing direct services from Ireland to U.S.

ITALY

International Traveler Profile:

- U.S. remains as the top long-haul preferred destination
- New York, California and Florida remain the most preferred destinations within U.S.
- Expenditures by Italian tourists in the U.S. is one of the highest from European countries
- Average length of stay is 12 nights for Florida market
- Fly/drive packages are the most popular, with customer choosing the itinerary and the tour operator providing the estimated cost on an individual basis

Travel Preferences & Trends:

- Cultural, historical and ecological attractions/activities are preferred when visiting a destination
- Non stop lift from Rome and Milan into Miami positively exposes the Florida Keys to the Italian traveler
- Italian tourists tend to make their travel arrangements late (54% of packages were sold between 15 and 30 days before departure).
- Miami and the Florida Keys realize 62.6% of all Italian visitors to Florida
- Summer peak travel period is July-mid September, with over 45% of all long haul travel occurring during August

Economic Considerations:

- Incoming travel to the U.S. from Italy is estimated to grow by 33%, one of the highest growth rates in Europe as compared to other countries.
- The Florida Keys attracts the sophisticated, upscale Italian tourist. This market segment is not adversely effected by swings in the general economic climate.
- Italian tour operator catalogues have a shelf life of only 3 months, compared to the 6 month shelf life for their British and German competitors.
- The number of travel agencies in Italy has increased by over 75% in the past 8 years.

THE NETHERLANDS

International Traveler Profile:

- The U.S. is the favored long-haul destination
- California, Florida and New York are the top three visited destinations
- Florida is the most popular among first time visitors
- Miami is the second largest port of entry into the US for the Dutch
- Prefers fly/drive vacations
- The Dutch traveler is usually a young couple without children or active senior market
- Tend to be repeat visitors, come from high income group and speak excellent English

Travel Preferences & Trends:

- The Netherlands is one of the ten fastest growing international travel markets.
- Dutch travelers seeking “new” experiences, i.e. diving, dolphin encounters, etc.
- Florida destinations must maintain its competitive edge to attract repeat visits
- Prefer mid priced hotels vs. luxury accommodations
- The “active senior” segment is the fastest growing travel sector coming out of the Netherlands

Economic Considerations and Political Trends:

- Positive economic developments may stimulate travel
- The U.S. is expected to remain top long haul destination due to marketing efforts
- Increased lift into Florida will positively stimulate Keys exposure to Dutch visitors

NORWAY

International Traveler Profile:

- Average age is 39 years old
- Most are family oriented, with 1 or 2 children accompanying adults
- Average length of stay is 16 nights
- Seeking tailor made vacations
- Summer travel occurs between end of June and mid-September
- Will research destinations on-line, but consult travel trade for actual booking

Travel Preferences and Trends:

- The U.S. continues to be the preferred long-haul destination
- Norwegians prefer “sun and coastal” destinations to escape harsh climate
- Interested in “action and adventure” travel (scuba diving, deep-sea fishing)
- Over 63% of all travel to the US is organized through specialist travel agents, which will tailor the vacation to the specific requirements of the traveler
- The fastest growing demographic group is the 60+ segment

Economic Considerations and Political Trends:

- Norway is one of the most prosperous countries in the world
- Per capita GDP income equals that of the United States.
- Additional week of vacation granted last year may stimulate visitation growth during autumn

SPAIN

International Traveler Profile:

- The United States is most favored long-haul destination
- New York, California and Florida are favored destinations within US
- Average length of stay averages 7-9 days
- Average age of long haul traveler is 25-45 years

Travel Preferences and Trends

- A majority of Spaniards vacation during the month of August
- 62% travel with families, 32% as couples
- Spanish travelers are late planners, with most consumers booking their travel within 30 days of departure. Operators publish summer catalogues no sooner than late April
- 50% of Spanish travelers are repeat visitors and belong to the upper middle class

Economic Considerations and Political Trends:

- Spain is a member of the Visa Waiver Program
- Daily, non-stop service to Miami on several carriers makes travel to Florida convenient

SWEDEN

International Traveler Profile:

- The United States is second most favored long-haul destination
- Top three visited states are: California, New York and Florida
- Average Length of stay is 14 days
- Prefer destinations offering sun and beaches
- Prefer budget and mid price accommodations

Travel Preferences and Trends:

- Eco tourism and soft-adventure trips on the rise
- Most travel is conducted June-September
- Average annual growth in number of Swedes visiting U.S. is 8% per year
- Prefer fly/drive packages with “add on” opportunities
- More and more Swedes are traveling to the Keys without a pre-paid reservation

Economic Considerations and Political Trends:

- Swedish economy is strong
- Greatest growth potential is in holiday fly/drive tours
- Tour operator market is highly competitive; service and value is key

UNITED KINGDOM

International Traveler Profile:

- Florida captures 41% of the market share for all UK visitors to the US
- Top three visited states were Florida, New York, and California
- Stays for 12.3 nights
- School summer vacations begin mid to late July through September, with peak travel times during the month of August.
- Families will stay in hotels, private and/or rented homes. Couples will stay in small inns, bed and breakfast type accommodations
- Sun and beach trips continue to be the most favored holiday, but the seasoned traveler is seeking more action and adventure

Travel Preferences & Trends:

- Up to 75% will use a travel agent
- 54% will use a tour operator
- 26% will book via the internet
- Variety of products and services, familiar lifestyle and language are all important booking factors
- Current booking trend is still a late booking market, although some tour operators are now beginning to take some future bookings for busy periods (especially family market)
- The UK traveler continues to search for new areas to visit. Niche markets continue to grow which gives some new opportunities for the Keys (i.e. diving, sailing, gay market, weddings and honeymoons)

Economic Considerations and Political Trends:

- British Pound to remain strong, with current exchange rate at 1:1.8 ratio. (GBP:\$)
- Retail sales and housing prices continue to grow above forecasts
- Increased air capacity through AA, BA and charter flights into the U.S. will help grow UK visits to pre 2000 levels later this year, into 2006.

II. ASIA

JAPAN

International Traveler Profile:

- The US. continues to be the most popular long haul destination
- The top three visited states were Hawaii, California, New York
- The states with the greatest potential for an increase in arrivals is Nevada, California, Florida
- Hawaii will remain at top place
- The active senior traveler is the fastest growing market segment in the Japanese tourism sector
- Visits mainland for approximately 8 days
- Stays in hotels and condominiums
- Prefers shopping, natural and scenic attractions, “observational tourism”
- Amongst packaged and group travelers, 53% used full package tours involving tour guides and local guides
- Mainland U.S. visitors are young, with over half under the age of 35, and with very high household incomes (equivalent to \$100,000 USD or more)

Travel Preferences and Trends:

- Japanese prefer to travel in groups
- Peaks in travel to FL are late Aug/Sept. and during “Golden Week” (Apr/May)
- Visiting museums, photographing points of interest and shopping are popular
- One in five Japanese visitors use a tour operator for destination information
- Travel agencies remain the most widely used source for travel information

Economic Considerations and Political Trends:

- Enthusiasm for specific destinations are cyclical; Florida may become popular again
- World events must remain stable in order for the Japanese to travel long haul
- Yen is still stronger than the USD, making a trip to the U.S. good value

III. NORTH AMERICA

CANADA

International Traveler Profile:

- Florida remains the #1 destination of choice
- Average age is 45-64 years old
- Prefer sun and beach destinations, although cruises and golf tours coming on strong
- Average length of stay is 8 nights

Travel Preferences & Trends:

- Florida, California, and Arizona rank as top non-border state destinations
- Canadians prefer to use their cars to travel with only 30% using air lift services
- 55% of all Canadians traveling to U.S. originate from Ontario province
- 50% of Canadian tourists prefer to stay in hotels or motels.
- The Canadian traveler seeks “value for price paid” when selecting accommodations

Economic Considerations:

- The Canadian dollar has gained strength in relation to the US Dollar, and with hotels offering more incentives and value adds, this may stimulate an increase in Canadian travel.
- Sun destinations like Mexico and all inclusive resorts in the Caribbean are competitive
- Canadian economy forecasted to grow solidly

IV. SOUTH AMERICA

ARGENTINA

International Traveler Profile:

- 47% traveled on holiday/ 48% on business
- Top 3 states visited are Florida, NY and California
- Average length of stay in the U.S. is 20.8 nights
- Miami is the No.1 Port of Entry to the US.
- 73% prefer hotels, motels
- 94% are repeat visitors to the U.S.

Travel Preferences and Trends:

- Enjoy shopping, dining out, sightseeing, visiting historical sites
- Many wealthy Argentines travel 2 or 3 times per year to the US
- Argentines tend to be well traveled and will split their travel planning evenly between packages and FIT bookings
- Rent cars for intra state travel (e.g. Miami to Orlando), but will fly between destinations (e.g. Orlando to New York)
- Annually, more Argentines visit Miami than visit Orlando, New York City, Los Angeles, and San Francisco combined

Economic Considerations:

- Even with the devaluation of the Argentine currency, travel to the US. is still a less expensive option than Europe
- The visa waiver program has created a backlog of requests for Visas. The US Consulate in Buenos Aires receives over 500 requests an hour for visas, with each Visa priced at \$100 USD each.
- The top ten tour operators in Argentina generate more than 50% of long haul travel transactions.

BRAZIL

International Traveler Profile:

- Top three visited States last year were Florida, New York and California
- Miami is the number one Port of Entry for Brazilian travelers
- 85% of visitors are adults only
- The majority of Brazilian visitors to Florida enjoy a household income of over \$100K annually
- Tends to combine business trip with leisure excursions
- Brazilians tend to travel to FL in July, followed by December and January

Travel Preferences and Trends:

- Visiting friends and family is the #1 attribute of travel to Florida
- 88% of Brazilian travelers to FL are repeat visitors
- Favorite pastimes are shopping, gambling and theme parks
- 52% of outbound travelers vacationed with their family
- 62% of Brazilians used a travel agent to organize outbound trips

Economic Considerations:

- New political administration is stabilizing the economy
- Brazilian "real" has lost its value recently, making travel to the US more expensive
- Conclusion of Visa waiver program making travel to the US more difficult

GROUP MEETINGS AND INCENTIVE MARKET OVERVIEW

The current group meetings and incentive market within Monroe County has weathered the budget cuts and downsizing that have taken place in the past few years. More economic activity and rising corporate revenues indicate a positive future in the meetings industry. Among those criteria that would influence the selection of a destination by group meeting planners are the availability of lodging properties and meeting space, ease of transportation for attendees, transportation costs, distance traveled and the availability and diversity of recreational activities. Other factors influencing the decision making process is quality of food service, size of rooms, billing procedures, quality of sleeping rooms and efficiency of check-in and check-out procedures.

The group meeting and incentive market segments remain a vital revenue-generating component for many of the hotels and resorts throughout Monroe County. It provides a strong occupancy base, which helps drive RevPar within the property. Group business also contributes to the overall food and beverage revenue on property as well as on-site water-sports concessions, gift shop revenues, etc. Local attractions, art galleries, restaurants and retail shops benefit from these group attendees since their travel and accommodation expenses are usually covered, thereby allowing them more discretionary spending while visiting a destination. An attendee of a meeting in the Florida Keys is also a potential repeat leisure traveler.

Shorter-term booking pace remains evident in all major domestic feeder markets; however, the industry is trending to the position where hotels have retained the power to set rates. In resort oriented destinations such as the Florida Keys, meeting planners are finding it increasingly difficult to not only stay within their travel budgets, but also find availability, most especially during peak winter months that include weekend nights. In this regard, longer-term booking requests are resuming in an effort for the planner to retain some negotiating power in room rate and availability.

Security and safety for the meeting attendee remains a major concern, and the trend for companies to stay within US borders has continued to benefit the destination.

Geographic marketing focus continues within the traditional feeder markets, such as the Northeast, Mid-Atlantic, Midwest and the Southeast. Particular market segments that have shown to have healthy budgets include incentive, pharmaceutical, medical education, financial and government markets. An emphasis will be on the corporate, association and government markets in the Southeast and Florida regions. Monroe County enjoys a healthy government per diem rate (\$135 in the off season, including the Aug/Sep time frame), and Florida associations are mandated to stay within the State for all meetings business. Government and association businesses tend to utilize mid-week patterns, thereby not compromising the strong leisure weekend demand. Many of Florida's universities have Colleges of Medicine, Nursing, Law and Research that require staff to obtain continuing education credits. The Florida Keys is an attractive destination to these professional attendees. Southeast regional corporate business benefits from the increased direct lift from Atlanta and are not deterred by our warmer weather in the summer and fall months.

Incentive programs, for businesses that reward employees, are excellent sources of business for the Florida Keys. Travel budgets tend to be more flexible, actual work time is minimal and interactions with local attractions are key features to these programs. Maintaining relationships with incentive houses such as Maritz, Carlson, Navigant, etc., are key to keeping our destination in the forefront of their very competitive marketplace.

There are several professional associations which we align ourselves with for assistance in several areas within the meetings and incentives market. These associations include Meeting Professionals International (MPI), Visit Florida (FLAUSA), Florida Society of Association Executives (FSAE), Tallahassee Society of Association Executives (TSAE), Association Forum of Chicagoland, Society of Government Travel Planners, (SGTP) and the Hospitality Sales and Marketing Association International (HSMAI).

As a unique destination for groups, we will continue to seek meetings and incentive business ranging in size from 15 to 300 attendees.

DOMESTIC MARKET OVERVIEW

Visitors to the Florida Keys will continue to follow the predictable patterns of the changing seasons. The Northeast and Upper Mid West regions will visit our area in the winter months, while guests from the Southeast and Florida are most likely to vacation in the Keys during the warmest months. There are also regional markets that have opened up since the inauguration of the regional jet service from Hartsfield International Airport in Atlanta. Areas in Tennessee and the Carolinas are now enjoying convenient and more economical jet service from Atlanta to Key West and can stimulate growth during our shoulder seasons. These 'in-between' seasons require acute understanding of potential niche travel markets as well as the exploration of some additional emerging geographical regions.

With a series of new products entering the Keys lodging inventory, new markets will open to the Keys for exploration and promotion. The self-catering units (condos, villas, apartment style accommodations) are the preferred lodging of choice for family reunions, generation vacations (parents, grandparents and children traveling together), destination weddings and the affluent mature market. Although the family reunion and generation vacation market may be influenced by the school calendar, not all families will have children that return to school in the beginning of August, thereby opening up the entire month of August and possibly early September for this segment. In addition, destination weddings, the affluent mature market as well as gay and lesbian travelers are not effected by school term patterns, thereby benefiting the softer shoulder seasons.

The "Double Income No Kids" (DINKs) profile is another positive source of shoulder season business. Without having the burden or limitations of traveling with children, two disposable incomes and the ability to be spontaneous, short but frequent getaways are not uncommon. This traveler profile also prefers the charm and uniqueness of our many guesthouses, inns and smaller hotels and participates in our cultural, historical and restaurant offerings.

Emerging secondary geographical regions can include not only those regions within a 90 minute drive of Atlanta airport, (as mentioned above), but also the regions of Texas, California and Colorado. The Texas traveler profile includes travel during the summer months, with Colorado traveling during mud season (Apr/May and early June) and then again in the fall months (Sep/Oct/Nov) before the first major snowfall. Californians have reduced travel to Hawaii and Mexico and are searching for new, tropical destinations. Flight times from the West Coast to Miami are virtually the same as flight times to Hawaii, so transit time and availability are not a challenge. The waters off California are always cold and not conducive to snorkeling or scuba diving.

Information gleaned from participation in consumer shows this past season indicated that consumers were seeking a bargain when purchasing their airline tickets and were comfortable flying low cost carriers. Most of these low cost airlines (i.e. Jet Blue, Southwest, AirTran etc.) utilize smaller, more regional airports. (i.e. Ft. Lauderdale vs. Miami). A majority of these airline ticket purchases were completed on line. With the usage of more regional airports, consumer sentiment indicated that they would consider a twin-center holiday within the Florida Keys to help

break up the drive from Ft. Lauderdale. They were also willing to take their time to enjoy the scenic drive along the Overseas Highway and visit some of the smaller attractions along the way. In addition to this trend, where the consumer was looking for a bargain in airfare and willing to take the extra time to drive to their final destination, they were willing to upgrade their choice in overnight accommodations.

As more and more consumers seek vacations that include interacting with nature or re-connecting with loved ones, the specialty markets focusing on Adventure, Honeymoon/Romance and Cultural/Historical travel will be targeted. All of these market segments prefer upscale accommodations where service and comfortable amenities are available to them.

Our relationships with the domestic travel trade continue to reward us with many benefits, as our Visitor Profile Survey reports that travel agents continue to recommend the Florida Keys and Key West as a vacation destination. In addition, the AAA source book continues to be the #1 recollection and referral source of inquiries to the Florida Keys. Continued education to these agents will provide them with the information they need to direct potential visitors our way and positively influence their travel buying habits. Virtuoso agents, American Express Platinum and Black card travel services and home based agents continue to have a loyal customer data base, trend towards high income, high spend customers and offer the service and personal attention that the demanding consumer expects.

If the US Dollar weakens against foreign currency, many Americans who would normally consider traveling abroad for their vacations would re-consider and staying Stateside. This can positively effect our summer and fall seasons when most of this type of international travel usually occurs.

GAY/LESBIAN MARKET PROFILE

The Gay market segment continues to show consistent growth, and occupancy levels in the gay and gay friendly properties have remained high. Although there has been a reduction in the overall gay room inventory, occupancy in the remaining properties as well as that of gay travelers utilizing mainstream hotels has risen significantly. A recent survey by the Key West Business Guild showed that over half of the respondents choose to stay in mainstream resorts and hotels averaging above 4 nights.

The destination advertising and continued marketing to consumers both domestically and internationally have insured the growth of this segment. Promotions in venues popular with younger and more affluent travelers are showing positive results. Research and expansion of our marketing efforts to this group should continue as there is increasing competition for them. For over ten years we have maintained a direct consumer approach which is now being copied by other destinations, making the gay travel dollar that much more competitive.

Gay and Lesbian travelers tend to make spur-of-the-moment decisions to travel to the Keys. Visitors book one day and arrive the next. Gay travelers were the first group of visitors to return after the events of September 2001 with many driving from the northeast and Midwest. They continue to be a group with disposable income and a propensity to travel at any time of the year.

Travel agents and tour operators that specialize in gay and lesbian travel find the Keys an excellent destination. While we compete with products like all-inclusive gay cruises, the Keys remain one of the top selling gay-friendly destinations. The TDC's membership in the International Gay & Lesbian Travel Association, coupled with having a seat on its board of directors, gives us a high profile in this travel market. The IGLTA has over 1,000 members, with offices in the United Kingdom, Germany, Spain and Australia. With direct access to our TDC representative and our resources, the Florida Keys is able to deliver consistent and up to date information to assist in selling our product.

Results of our promotions in the international arena are beginning to show in the increase of international gay and lesbian visitors to our area. We have promoted the destination at ITB, World Travel Market, International World Travel Expositions, gay & lesbian lifestyle and travel shows, and pride festivals in key cities throughout Europe. Coordinated press trips have brought journalists from leading domestic publications as well as top gay international publications. Gay travel television shows featuring Key West have aired in the UK, Sweden and Canada. The gay trolley tour was featured on a Japanese morning drive radio show, and the annual drag races were showcased on the morning television show in Seoul, Korea.

Gay and lesbian friendly events, i.e. Fantasyfest, Pridefest and Womenfest, bring visitors to our island during the slowest times of the year.

The gay and lesbian community has more disposable income, and enjoys longer stays. They enjoy sightseeing, local culture, dining, shopping, museums, and beaches. Top motivations for selecting Key West as their vacation destination continue to be the variety of things to do, having a reputation for being gay-friendly and being a safe destination. This makes the gay and lesbian market extremely lucrative for our destination. Based on national population figures, the American gay and lesbian community represents a US \$54.1 billion travel market.

FY 2005-2006 SALES ACTIVITY CALENDAR

OCTOBER 2005

October 4-7

Meetings Quest and Area Sales Calls

Minneapolis /St. Paul, MN

Registration: \$2,200

Stacey Mitchell

Meetings Quest is a one-day trade exhibition focusing on corporate and association meeting planners from the twin cities area. Minneapolis also has the strongest concentration of incentive houses in the country, thereby affording us the opportunity to showcase the destination to these very influential and high spending planners. Area sales calls will be conducted prior to the Meetings Quest event.

October 5-8

DEMA

Las Vegas, NV

Registration: Covered by Dive Umbrella

Susanne Tortu

This is a trade-only event focusing specifically on the sport of diving; its manufacturers and dive-related travel destinations. Dive consumers are not in attendance. Attendees come from all facets of the dive industry in addition to travel agencies and tour operators specializing in dive vacations and travel. The Umbrella committee has contracted for 400 square feet of prime convention space forecasting 6 to 8 dive operators to attend.

October 8-10

Salon Envie de Partie

Paris, France

Registration: \$1,000

Sabine Pons-Chilton

The Florida Keys will be participating **via brochure distribution**. This consumer event is held every October, and is attended by all the major tour operators and their clients. The Florida Keys and Key West has been invited to attend this event in cooperation with Visit Florida to showcase our destination to high end consumers from the greater Paris region.

Educational workshops and table top exhibits for trade only followed by a 5 hour consumer show.

The Florida Keys and Key West has participated in these venues for the past ten years and provide a means to network with travel professionals and consumers who travel on a regular basis.

October 29-30, 2005

Birmingham Dive Show

Birmingham, England

Registration: Covered by Dive Umbrella Cellet Travel Services

The active British diver has enjoyed diving the reefs of the Florida Keys for years. This annual Dive Consumer event in the UK is found to be the best place to go for an instant overview of the sport. Last year's Birmingham Dive Show attracted a massive 16,632 visitors and this year's show promises to be just as popular. Umbrella Committee members have also agreed to use advertising funds in conjunction with this event. UK Divers rank high with the majority of Keys Dive Operators as they have a longer length of stay and visit throughout the year, not just within the summer months.

October 2005/Spring 2006

Gay and Lesbian World Travel Expositions/Int'l Conference on GLBT Tourism

Montreal, CA**

Registration: \$2,850 Steve Smith

Brochure Distribution available at \$50 per partner.

The Gay and Lesbian World Travel Expositions are held in six cities across the United States (****New York, Washington DC, Los Angeles, Seattle and Orlando**) and follow a format including a gay travel workshop/tabletop exhibit for trade only followed by a five hour consumer show. These travel expositions provide a means to network with travel professionals involved with the gay market and consumers who travel on a regular basis.

October 30-November 2

Florida Encounter with Visit Florida

Hollywood, FL

Registration: \$2,000 Susanne Tortu

Florida Encounter is designed and produced by Visit Florida who only allows Visit Florida partners to exhibit independently. The two-day tradeshow features computerized pre-scheduled appointments and a one-to-one ratio between qualified meeting planners from outside the state of Florida and Florida's top meetings and conventions suppliers. This year Florida Encounter will celebrate its 25th anniversary, which will be held at the Westin Diplomat Resort & Spa in Hollywood, Florida. For additional information, contact Visit Florida, 850-488-5607

NOVEMBER 2005

November 3-6

Minneapolis Vacation and Travel Show with Visit Florida

Minneapolis, MN

Registration: \$375

Jutta Farrer

The TDC will participate at this event **via brochure distribution**. This includes both the trade and consumer days during the exhibition, along with presentations being made in the Bloomington area to the AAA headquarters for that region. The Travel show anticipates more than 15,000 consumers to attend this three-day event during the prime winter and spring break planning period. The twin cities area enjoys convenient lift into South Florida via American Airlines, Northwest Airlines and several low cost carriers.

November 11-13

Adventures in Travel Expo/Luxury Travel Expo

San Francisco, CA

Registration: \$4,500 Jutta Farrer

Brochure Distribution available at \$200 per property.

Adventures in Travel Expo is the world's premier event serving adventure, eco and outdoor tourism enthusiasts and professionals. National Geographic Traveler and Adventure magazines are the key media sponsors of this event, insuring high end media and travel professional exposure. The first day is limited to the travel trade, with the next two days open to consumer traffic. The Luxury Travel Expo showcases resorts, destinations and travel product geared toward the discriminating traveler. The Luxury Travel Show is being held adjacent to the Adventure show, allowing members of the travel trade and consumers the opportunity to attend both events.

November 14-18

World Travel Market

London, England

Registration: \$31,000 Stacey Mitchell/Cellet Travel Svcs.

Co-op participation available at \$1,200 per delegate in destination booth.

Brochure Distribution available at \$300 per property

World Travel Market is the UK's largest annual travel trade show. This show will be held at the ExCel Exhibition Center located in London. FLAUSA creates a Florida Pavilion for the state industry to exhibit their products and meet with travel agents, tour operators, and travel media

The UK market is the cornerstone of the Florida Keys international marketplace. The Florida Keys will continue to show a strong presence in this marketplace to build on existing trade relationships as well as identifying emerging "niche" travel markets.

November 19-20

7th Annual Gay Life Exposition

New York, NY

Registration: \$3,500 Steve Smith

Co-op available at \$175; Limited to 12 delegates.

For the seventh year, the Florida Keys and Key West will participate in one of New York's most successful Gay and Lesbian consumer shows. Last year, 15,000 consumers and travel professionals attended. As a sponsor, our destination will gain more exposure prior to and during the show through direct mail promotions, posters, discount coupons, etc. The timing of this show also leads into our winter season, and our presence puts the Keys up-front for winter vacation planning.

November 20-23

UK Educational Experience

Florida Keys, FL

Sabine Pons-Chilton

American Airlines is sponsoring ten (10) of the most productive tour operators/product managers selling the Florida Keys on a four day interactive visit to the destination. Overnight accommodations in the upper, middle and lower keys are being solicited, as well as attractions in each area. This Familiarization trip will be escorted by TDC staff and is the perfect venue to showcase new or improved product as well as concepts to feature in the next brochure/catalogue run.

DECEMBER 2005

December 10-13

German Incentive Educational Experience

Florida Keys, FL

Jutta Farrer/Gunter Weirich

US Airways is sponsoring eight (8) of the most productive tour operators/product managers selling the Florida Keys on a four day interactive visit to the destination. Overnight accommodations in the upper, middle and lower keys are being solicited, as well as attractions in each area. This Familiarization trip will be escorted by TDC staff and is the perfect venue to showcase new or improved product as well as concepts to feature in the next brochure/catalogue run.

JANUARY 2006

January 11-16

Vakantiebeurs

Utrecht, The Netherlands

Registration: \$2,200

Gunter Weirich/GIA Germany

The TDC will have representation at this tradeshow via our German sales office and within the FLAUSA pavilion.

Considered the largest travel and tourism event in The Netherlands, over 150,000 consumers and travel trade attended in January 2005. First day is limited to travel trade and media only with an appointment based format, and the TDC will have the ability to conduct one-on-one educational presentations with select members of the travel trade via a 'fair share lunch' coordinated by Visit FL.

The US is the number one preferred long-haul destination for the Dutch market, capturing 32% of the long haul market share. The Dutch prefer warm and sunny destinations, and has a keen interest in outdoor activities, soft adventure and eco tourism.

January 13-16

Reiseliv

Lillestrom, Norway

Registration: \$1,000

Sabine Chilton

The TDC will have representation at this tradeshow **via brochure distribution**. Reiseliv is Norway's premier Travel and Tourism show. This is the most important forum and market place for the Norwegian and international travel industry in Scandinavia. The show is open to both travel trade and consumers. Last year's attendance topped 40,000 visitors, and the request for information on The Florida Keys and Key West continues to grow.

January 13-15

Adventures in Travel Expo

New York City, NY

Registration: \$4,600

Stacey Mitchell/Sabine Chilton

Brochure Distribution available at \$200 per property.

Adventures in Travel Expo is the world's premier event serving adventure, eco and outdoor tourism enthusiasts and professionals. National Geographic Traveler and Adventure magazines are the key media sponsors of this event, insuring high end media and travel professional exposure. The first day is limited to the travel trade, with the next two days open to consumer traffic.

January 29-31

Florida Huddle

Ft. Lauderdale, FL

Registration: \$2,300

Sabine Chilton

Co-op participation not available at this time. Keys exhibitors should contact International Productions at (407) 856-4747 directly. TDC will coordinate a Florida Keys section if number of registrants from the destination warrants.

Huddle is a mini Pow Wow computerized appointment show. It is exclusively formatted to promote Florida product to the international FIT and group tour market. There are only 2 shows per year designated for the international market: Pow Wow and Huddle. Florida Huddle is not as cost prohibitive and will give you Florida-specific exposure.

FEBRUARY 2006

February 8-10

Society of Government Travel Planners (SGTP)

Alexandria, VA

Registration: \$500

Susanne Tortu/Jutta Farrer

SGTP is the national forum of the \$28 billion government travel market. Government travel buyers are seeking factual, relevant information and are very active in the Federal Procurement arena. Complimentary invitations are given to Government planners with convenient transportation to/from the Pentagon. This show allows for prospecting for summer/fall business, as the government per diem rate is currently higher than some advertised rates throughout the County during this time of year.

February 10-12

Adventures in Travel Expo

Washington, DC

Registration: \$4,500

Susanne Tortu/Jutta Farrer

Brochure distribution available at \$200 per property.

Adventures in Travel Expo is the world's premier event serving adventure, eco and outdoor tourism enthusiasts and professionals. National Geographic Traveler and Adventure magazines are the key media sponsors of this event, insuring high end media and travel professional exposure. The first day is limited to the travel trade, with the next two days open to consumer traffic.

February 18-21

BIT/Italian Tour Operator Presentations

Milan, Italy

Registration: \$3,200

Sabine Chilton/Stacey Mitchell

The TDC will participate within the pavilion facilitated by Visit Florida. BIT is Italy's largest trade and consumer show, attracting over 25,000 trade attendees over a four-day period. Italian visitors travel almost exclusively during the month of August, and with new daily non-stop flights from Milan and Rome into Miami, the Italian market warrants marketing. The Commercial Service of the Visit USA Committee/Italy, in cooperation with the TDC, will pre-schedule appointments for the destination during the first two days of the show.

February 24-26, 2006

Our World Underwater Dive Show

Chicago, IL

Registration: Covered by Dive Umbrella

Susanne Tortu

Celebrating its 36th anniversary, Our World Underwater has returned to a dive specific consumer show. Cooperative participation available to the first four (4) Dive Industry delegates at \$250.00 per Dive Operator. This is a well-attended consumer show, catering to the Dive Consumer in the Midwest market, where research has shown a large percentage of certified divers.

MARCH 2006

March 6

Visit USA Brussels

Brussels, Belgium

Registration: \$1,450

Stacey Mitchell

This is the largest travel tradeshow offered in Brussels, targeting the travel trade from the Benelux countries. Approximately 250-300 tour operators, travel agents and members of the press gather just prior to the ITB for a day of workshops and tabletop presentations from various destinations.

March 8-12

International Tourismus Borse (ITB)

Berlin, Germany

Registration: \$25,000

Jutta Farrer/Stacey Mitchell

Co-op opportunities available at \$950. per delegate.

Brochure distribution available at \$300 per property.

This trade fair is known as the world's largest tourism showcase. ITB continues to be the "Must Attend" tradeshow for any one who is committed to the International Marketplace. The most recent Visitor Profile Survey listed Germany as the number two ranked origin of international visitors, therefore making ITB one of the most important trade events of the year. Our German market sales and public relations office will coordinate appointments during the trade and media days, targeting both niche market and mainstream trade.

March 23-26

TUR

Goteburg, Sweden

Registration: \$5,000

Sabine Chilton/Cellet Travel Svcs.

Brochure Distribution available at \$300 per property.

TUR is *the* trade and consumer show dedicated to the Scandinavian market and is held during the prime booking season of March. Tour operators from Denmark, Sweden and to some extent, Norway attend this show to gather information regarding destinations and products to feature and promote to their retail agencies for summer business. Scandinavians enjoy five weeks of vacation per year, are seeking active vacations and are enjoying increased long haul lift opportunities into Florida. This will be the first time that the Keys will be physically attending this show.

March 24-26

Beneath the Sea Dive Show

Secaucus, NJ

Registration: Covered by Dive Umbrella Susanne Tortu

Co-op participation available to the Dive Industry at \$250. per Dive Operator.

Maximum number of participants will be six, and final participation will dictate booth space. This is a well-attended consumer show, catering to the Dive Consumer in the lucrative Northeast corridor. We received great exposure at the 2004 show and expect to increase exhibit space this year to 400 square feet.

March TBD

Success 2006 Meetings Marketplace w/Tampa MPI Chapter

Tampa, FL

Registration: \$500 Susanne Tortu

Close to 115 meeting planners from the Tampa Bay metro region as well as Central Florida attend this educational event which includes a trade show promoting meetings and event locations throughout the state. The Bay area has good lift into the South Florida/Key West area, has a variety of medical, insurance and corporate offices that hold meetings outside of their geographical area, and planners from this region have a propensity to plan programs during our traditional 'off season'.

APRIL 2006

April, TBD

North Carolina Sales Calls with Visit Florida

Raleigh/Durham and Charlotte, NC

Registration: \$300 Jutta Farrer

Visit Florida will be conducting sales calls in the Raleigh-Durham and Charlotte, NC metro areas to travel agencies and AAA offices. These areas enjoy convenient lift into South Florida via American Airlines and several low cost carriers and tend to travel in the shoulder and summer seasons to our area. The TDC will be participating **via brochure distribution**.

MAY 2006

May 2

Pridefest Philadelphia

Philadelphia, PA

Registration: \$500

Steve Smith

Brochure Distribution is available at \$50. per partner.

Philadelphia hosts the nations largest gay and lesbian festival. This consumer event draws thousands from the metro Philadelphia region, which is very accessible to the Keys via American Airlines and US Airways.

May 3

Golden Opportunities with Meeting Spots

Tallahassee, FL

Registration: \$1,000

Susanne Tortu

Co-op opportunities available at \$250 per delegate; limited to 9 delegates. This evening show focuses on the extensive Florida Association market, which is critical to the Florida Keys summer business base. The Florida Association market is one that requires gradual relationship building and entails consistent sales visitation and networking. All major Florida CVB's attend and the show guarantees seeing no less than 200 planners.

May 6-10

TIA's POW WOW

Orlando, FL

Registration: \$10,500

Sabine Chilton/Stacey Mitchell

Co-op opportunities available, limited to 4 delegates. Registration will open in early fall. Companies interested in pursuing the international market and joining TIA should call (202) 408-8422. This show sells out every year, so early registration is critical for exhibiting.

Pow Wow is the premier marketplace for over 1500 inbound tour and travel promoters. Participation in this show is key in pursuing the wholesale market, with participants hailing from over 70 nations. This is the most important event for anyone who is interested in maintaining promotional efforts in the international marketplace.

May 10-14

Post Pow Wow Educational Tours

Florida Keys

Sabine Chilton/Stacey Mitchell

The Florida Keys and Key West will be offering educational tours within the destination to ten (10) of the most productive tour operators/product managers selling the Florida Keys on a four day interactive visit to the destination. Overnight accommodations in the upper, middle and lower keys are being solicited, as well as attractions in each area. This Familiarization trip will be escorted by TDC staff and is the perfect venue to showcase new or improved product as well as concepts to feature in the next brochure/catalogue run.

May 23-28

IGLTA Annual Convention

Washington, DC

Registration: \$850

Steve Smith

Brochure Distribution available for \$50. Delegates must be registered convention attendees.

This annual event draws over 300 travel professionals. The event continues to grow as the IGLTA membership now exceeds 1,200. Competition for gay tourism dollars is increasing with new destinations vying for this lucrative travel segment.

JUNE 2006

June 23-25

Atlanta Pride

Atlanta, GA

Registration: \$800

Steve Smith

Brochure distribution available at \$50 per participant.

This event draws thousands of consumers from the Atlanta metro region. This Pride event is well attended and booth participation will be limited. Past participation shows a continued interest in the destination making this a strong venue for our marketing efforts.

June TBD

Rocky Mountain ASTA Training and Area Sales Calls

Denver, CO

Registration: \$1,100

Jutta Farrer

Consumers from the Rocky Mountain region are seeking high end adventure vacations, and tend to travel during 'mud season' (Apr/May time frame) and then again in the 'dry season' (late Aug through Thanksgiving) before the first snow fall. With increased direct lift into South Florida from Denver, and the largest SCUBA club in the country, the Rocky Mountain region exhibits potential as an emerging market. While in the area, staff will conduct educational presentations to travel agents and corporate and incentive houses.

JULY 2006

July 25-27

Meeting World

New York, NY

Registration: \$3,500

Susanne Tortu/Stacey Mitchell

Meeting World has evolved into a two day trade event where buyers from the Tri-State area can request appointments with suppliers to research new and established venues for their meetings and conventions. Trade attendees are asked to submit two (2) current request for proposals (RFP's) when registering for this event, thereby pre-qualifying their attendance.

TDC staff will attend to review and critique this newly re-formatted show.

AUGUST 2006

August 5-6

North Halsted Street Days

Chicago, IL

Registration: \$1,200

Steve Smith

Co-op participation available at \$100 for four (4) delegates.

This event is in it's 14th year, and has been a sell out the previous eight. The event is the largest two-day Gay and Lesbian festival, and attracts over 250,000 attendees, including mainstream consumers. The greater Chicagoland area remains one of our strongest consumer markets, and continued promotions to this area are recommended.

August TBD

Florida Marketplace

TBD, FL

Registration: \$500

Susanne Tortu

Florida marketplace is an appointment based trade event geared towards bringing meeting professionals from outside the state of Florida together with destination marketers from within the State of Florida. This three-day event allows for formal one on one appointments between the buyers and sellers along with networking opportunities to further showcase the Florida Keys as a viable meetings destination. It is also beneficial to be able to promote to planners about the feasibility of holding programs in Florida during the warmer months.

SEPTEMBER 2006

September 26-28

Incentive Travel and Meeting Exhibition (IT&ME)

Chicago, IL

Registration: \$6,500

Susanne Tortu/Staff

Co-op participation available at \$850 per delegate. Maximum number of delegates limited to 10 participants. Cooperative participation will be solicited beginning November of 2005 for the ITME 2006 show.

The Annual Incentive Travel and Meeting Exhibition takes place in conjunction with the National Premium Incentive Show, and attracts nearly 20,000 travel buyers. Surveys indicate that 75% of the audience attend no other incentive show and over 54% of the attendees are the final decision-makers.

Visit Florida coordinates a "Florida Section" in a high profile area of the convention center, of which we traditionally register for 400 square feet of booth space. Visit Florida requires from each cooperative participant an individual "Florida Section Fee" from secondary partners at \$100. per delegate. For additional information, contact Visit Florida, 850-488-5607.

September TBD

Plan Your Meetings

Atlanta, GA

Registration: \$1,500

Susanne Tortu/Staff

This is a one day event targeting planners from the Atlanta metro region, allowing us direct exposure to planners from the greater Southeast region who utilize Florida product most often during the shoulder seasons, and who enjoy convenient lift via Hartsfield International Airport.

Ongoing Sales Efforts

Destination Days

Sales Staff

Presentations and destination training will be conducted to travel trade professionals in the South Florida area. These travel trade professionals include Certified Vacations/Delta Dream Vacations, Travel Leaders, AAA Auto Club South and Virtuoso Travel Agencies.

Bridal Shows

Sales Staff

In an effort to promote the destination as a viable wedding and honeymoon destination, the Florida Keys and Key West will be participating in bridal/honeymoon promotional events in key feeder markets. Co-operative participation will be made available whenever possible.

Electronic Marketing

Sales Staff

In an effort to increase our exposure to all market segments, sales staff will develop electronic marketing promotions utilizing our current database. These efforts will include electronic postcards, flash programs, e-newsletters as well as video. These efforts can be utilized as pre-promotional event notices, follow up tool to trade show participation as well as updates and periodic communications to established clientele base.

CELLET TRAVEL SERVICES, LTD.

UNITED KINGDOM

Services Provided:

Maintain Florida Keys Dedicated Phone Line
 Answer calls from consumers and trade professionals
 Arrange fulfillment through fulfillment house
 Conduct sales calls on behalf of destination
 Act as a resource by providing support for trade professionals
 Liaise with FLAUSA office in UK
 Liaise with McCluskey & Associates Public Relations
 Advise TDC and advertising agency on UK market trends & issues
 Monthly Sales Report
 Maintain strong alliance with Visit USA Association
 Personnel, administration, office facilities, consultation, communications
 Manage European Financial Operation
 Other operating costs

Fee \$45,000

Operating Budget:

Trade Events, Exhibits, Promotions, Special Projects:

<u>Activity</u>	<u>actual cost</u>	<u>expenses</u>	<u>co-ord. svc.</u>	
World Travel Market	\$0	\$1,200	\$2,000	\$3,200
Pow Wow	\$0	\$2,400	\$3,500	\$5,900
Pre/Post Pow Wow FAM	\$1,520	\$350	\$3,000	\$4,870
Manchester Con/Trade	\$4,500	\$700	\$2,000	\$7,200
Adventure Show	\$3,400	\$400	\$2,000	\$5,800
Irish Consumer Show	\$2,300	\$1,200	\$1,000	\$4,500
Sales Mission	\$0	\$0	\$2,000	\$2,000
Irish Tour Operator Promo	\$240	\$500	\$1,000	\$1,740
Southern Tour Op Promo	\$270	\$150	\$1,000	\$1,420
Northern Tour Op Promo	\$250	\$150	\$1,000	\$1,400
Co-op Trade Events	\$1,600	\$800	\$1,200	\$3,600
Sales News Update	\$9,000	\$0	\$2,000	\$11,000
Website Coordination	\$0	\$0	\$1,000	\$1,000
Retail Agents Promo	\$0	\$0	\$2,000	\$2,000
Resources				\$5,370

Sub-total \$61,000

Total United Kingdom Budget \$106,000

Germany (Switzerland, Austria)

Basic Services Provided

Maintain Florida Keys dedicated Phone/Fax line (+49 221 2336 451/450)
 Personnel, administration, office facilities, consultation, communication

Answer calls from consumers and trade professionals
 Arrange fulfillment through fulfillment house (Presse & Touristikdienst Nentwich)
 Act as resource by providing support for trade professionals
 Liaise with Visit Florida office in Paris
 Maintain strong alliance with Visit USA Committee
 Liaise with McCluskey & Associates Public Relations
 Advise TDC on market trends, Monthly Sales Reports
 Work on set up of niche products (*weddings, diving, gay & lesbian, condos*)
 Misc. operating costs

Basic Fee **\$ 23,000**

Operating Budget

	Costs	Fee	Total
1) Consumer Travel Shows/ Trade Shows (brochure distribution)			
<u>via Visit USA:</u>			
Cologne (with Visit USA; Nov 25-27, 2005)	\$ 700	150	850
Stuttgart (with Visit USA; Jan 2006)	\$ 700	150	850
Munich (with Visit USA; Feb 2006) (covers registration)	\$ 700	150	850
<u>via Visit USA Switzerland:</u>			
TTW Montreux – Trade Show in Oct. 2005) (covers registration)	\$ 200	150	350
Austrian/Swiss consumer travel shows 2006 Consumer Travel Shows (Jan/Feb/Mar 2006) (covers registration)	\$ 800	200	1,000
	\$		3,900

2) Specialized Shows: Booth & Assistance

ITB 2005, Berlin:

(Appointment Scheduling, stand assist/manning)	\$	3,000	3,000	6,000
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Gay Prides, Germany

Gay Pride, Berlin/Cologne: June/July 2006	\$	2,500	1,000	3,500
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Gay TO Promotion/Direct Mailing	\$	1,000	500	1,500
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Vakantiebeurs, Utrecht, Jan 2006

(covers booth asst., travel costs)	\$	1,000	1,300	2,300
	\$			13,300

3) Travel Trade Trainings

Participation in TO training/seminars:

Roadshows/seminars in various cities

In fall 05/winter 06	\$	3,000	2,000	5,000
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(covers registration, coordination, travel)

2 x VUSA Breakfast Seminar:

Presentation incl. brochure distribution (2006)	\$	1,500	1,300	2,800
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(covers registration, coordination, travel)

\$			7,800
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4) FL Keys Newsletter

\$	4,050	2,000	6,050
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\$			6,050
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5) FAM TOURS (coordination and execution)

\$	500	1,500	2,000
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6) Trade Partner Coop

7,500

7) Product Inventory

2,500

8) Office Resources

2,000

Total Operating Budget

\$		45,050
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Total Basic Services

\$		23,000
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Total Germany (Switzerland, Austria) Budget

\$		68,050
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Memberships

American Society of Travel Agents (ASTA)	\$ 465
Hospitality Sales & Marketing Association International	\$1,060
International Travel Services Association (ITSA)	\$ 410
Travel Industry Association of America (TIA)	\$2,300
International Gay and Lesbian Travel Association (IGLTA)	\$ 200
Visit USA Belgium/Luxembourg	\$ 650
Visit USA France	\$1,100
Visit USA Netherlands	\$ 700
Visit USA Norway	\$ 300
Visit USA United Kingdom	\$ 550
Visit USA Germany	\$1,300
Visit USA Italy	\$ 650
Visit USA Sweden	\$ 600
Society of Govt Travel Planners	\$ 450
Meeting Planners International	\$ 650
Association Forum of Chicago	\$ 325
Florida Society of Assoc Exec	\$ 175
Tallahassee Society of Assoc Exec	\$ 75
International Association of Convention/Visitor Bureaus (IACVB)	\$2,500
National Tour Association	\$ 525
American Bus Association	\$ 475
Resources	\$ 2,040

Total Memberships	\$17,500
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Measurability

Group leads follow up from hotels, i.e. room nights, number of attendees, lost business (if so, why).

Monthly reports from offices in UK and Germany reflecting trade and consumer inquiries and fulfillment data.

Annual UK and German market reports.

Annual Sales & Marketing Property Survey reflecting:

- Level of travel agent business

- Length of stay

- Market segment mix, i.e. domestic, foreign, corporate/group, leisure/group tour, etc.

- Geographical market trends

Post show evaluation to industry partners: Indicating feedback with regards to booking activity and inquiries as a result of show or sales call participation.

Tour Operator Reports: Current product selling trends within destination.

Fam Surveys: Indicating travel agent, tour operator or meeting planner feedback in regards to booking activity as a result of visit to destination.

Monitor visitor profile survey indicating travel trends in different market mixes.

BUDGET

Promotional Activities	\$ 166,000
Travel Expenses	\$ 105,000
Postage/Phone/Xerox	\$ 35,000
Memberships	\$ 17,500
Entertainment	\$ 10,500
Cellet	\$ 174,050
Resources	<u>\$ 60,000</u>
TOTAL LINE ITEMS	\$ 568,050

K. Public Relations

The Florida Keys & Key West public relations plan is designed to create and take advantage of editorial and promotional venues. Results achieved utilizing public relations techniques offer credibility that tends to be measured higher than most marketing promotions. The media is the lifeblood of effective public relations.

The essential elements of the public relations campaign are message development and positioning strategy; media analysis and relations; development of contributed news articles; editorial calendar development; media research; and crisis management communication.

Stuart Newman Associates (SNA), and its affiliates have been successful in securing media exposure for the Keys valued at many times the TDC's PR promotional budget. The agencies target their public relations efforts to ensure a comprehensive marketing approach with the other elements of the Marketing Plan.

The TDC PR program will maintain emphasis on cultural tourism and Eco-tourism in all phases of the public relations program. In 2005-'06, there will be added emphasis on international markets; increased focus on Gay and Lesbian markets; added e-marketing efforts, especially in international arenas; focus on meeting markets events and programs to maximize awareness of travel during late August and September for mature markets.

The following proposal outlines a public relations, publicity and promotion campaign for the fiscal year beginning October 1, 2005.

Objectives

1. Implement public relations techniques to attract new visitors and motivate previous visitors to return to the Florida Keys.
2. Promote awareness of and bolster the destination's image as a vacation venue that provides cultural/heritage tourism offerings in both domestic and international markets.
3. To promote international, national and statewide awareness and image of the Florida Keys & Key West as an Eco-tourism destination.
4. To promote awareness and image of Florida Keys special events and attractions.
5. To provide cooperative opportunities to the tourism industry for media familiarization trips.
6. To enhance the diversity of multicultural awareness of the destination.
7. To provide media information and editorial to the official website.
8. To support TDC sales efforts at select trade shows that attract media.
9. To promote awareness and image of specialty markets.
10. To implement a PR crisis management program during significant emergency situations.

Goals

1. Develop separate domestic, targeted media familiarization trips for meeting trade publications, mature publications, family travel and the art of romance.
2. Develop a media familiarization trip in conjunction with the 2006 Key West Literary Seminar for the coming year's focus on travel writing.
3. Develop promotional tie-ins for the Florida Keys & Key West with the July 2006 scheduled publication of Lorian Hemingway's new novel "Key West: The Pirate Heart."
4. Develop a post-Pow Wow media familiarization trip to the Florida Keys and take advantage of other opportunities of the convention's 2006 presence in Orlando.
5. Develop coverage on at least one of the UK's prime time terrestrial travel programs such as *BBC Holiday*, *GMTV*, *BBC Departure Lounge* or *Richard & Judy*
6. Develop four themed UK/European group press trips focusing on Florida Keys family travel.
7. Develop a bi-monthly electronic newsletter to be emailed out to key UK/European contacts, condensing the quarterly 'What's New' and events releases – each with a tour operator call-to-action.
8. Establish through visiting journalists stories on at least three top UK/European travel Web sites.
9. Develop a press trip for the destination with the planned national convention of the National Gay & Lesbian Journalists Association slated for September 2006, in Miami Beach.
10. Produce, distribute and enhance the monthly electronic newsletter to opt-in users of website.
11. Develop a PR program for the "Own a City" campaign in the greater-Washington, D.C. area.
12. Establish a Keys section for Visit Florida's quarterly newsletter for Japan.
13. Develop a high-definition videotape library.
14. Increase the number of travel writer articles.

The Public Relations Program – Domestic Overview

The agency will continue to execute a “generic” public relations program for the Florida Keys & Key West, taking advantage of spontaneous as well as scheduled opportunities. The generic program will include updating and creating general travel releases distributed via the Florida Keys & Key West media kit and website. The domestic program will also include Group Media Research trips and individual travel writers to the destination as well as researching, writing and distributing specialized travel releases to targeted publications.

Emphasis will be placed on creating spot news stories that provide strong travel awareness benefits for the destination for distribution to mainstream, regional, national and even international print, broadcast and Internet venues. These spot stories may cover indigenous special events or arise out of unforeseen circumstances that provide opportunities for positive reflection on the destination.

For distribution, agencies utilize extensive, continually updated databases. Currently, thousands of records are kept on journalists in the United States. Virtually all words and picture distribution is accomplished electronically either via electronic mail, or transmitting to wire service computer systems.

IMPLEMENTATION

Stuart Newman Associates will center its media relations efforts around cultural, heritage and soft-adventure themes. All travel media relations projects feature a significant marketing effort to publicize the Keys toll-free number and website providing a call to action.

Group Media Research Trips

The agency coordinates and personally supervises group media movements to the Keys. Some trips are in conjunction with Visit Florida, a few with private industry and others are initiated by the agency. Group media research trips coordinated by the agency are escorted by at least one member of the account team and usually take place over a three to six-day period. In the issuance of invitations for media research trips, a detailed screening process is observed to ensure participation from qualified journalists.

The agency continues to look for opportunities to co-op group familiarization trips either with a complementary destination CVB or private sector travel or outdoors-related industry.

From a budgetary standpoint, the agency will continue to allocate TDC funds for media air travel when needed. This is crucial for the Visiting Journalist program as complimentary air travel, provided by airlines, is not available due to budget cutbacks. Agencies always seek the lowest possible airfares available.

PRESS TRIPS

Press trips for 2005-2006 will be designed to appeal to a diverse group of journalists. The trips will be open to journalists from a blend of mainstream, gay, cultural, environmental and cover newspapers and magazines. Significant free time and individual assistance will be provided to allow the development of a wide variety of stories.

Literary Legends and Creative Cuisine Press Trip

This Key West research trip will coincide with the Key West Literary Seminar allowing journalists to immerse themselves in the island's literary present as well as gain insights into its colorful literary past. The trip's secondary focus, following on the success of previous cuisine-based press trips, will be the cuisine of Key West as prepared by the island's many acclaimed chefs. These chefs are creative artists in their way as are the literary masters appearing at the seminar.

The 2006 theme of the Key West Literary Seminar is "The Literature of Adventure, Travel and Discovery." A highlight of the press trip will be journalists' attendance at the seminar, with chances to interview Key West's present-day literary lights such as Judy Blume and Robert Stone.

Activities for the "literary legends" aspect of the trip also will include a private guided tour of "Fishing, Friends and Family: Hemingway in Key West 1928-1939" at the Key West Museum of Art and History; a walking tour of Key West's literary landmarks; tours of the Ernest Hemingway Home & Museum, Casa Antigua, and the Heritage House Museum and Robert Frost Cottage; and a visit to Tennessee Williams' and Elizabeth Bishop's former homes.

In addition, journalists will sample superlative Florida Keys seafood at gourmet dinners, discover the Cuban dishes that have influenced the Keys culinary scene, participate in an offbeat hot sauce tasting and learn the secrets to making perfect Key lime pie.

During these experiences, journalists will have the chance to meet some of the region's premiere chefs and restaurateurs.

The Art of Romance Press Trip

Scheduled for February to coincide with the Pigeon Key Art Festival, the Sculpture Key West exhibition at Fort Zachary Taylor and a performance of the Key West Symphony or Island Opera Theater, this trip will explore the Florida Keys' romantic appeal and artistic richness.

The romance component of the trip, focusing on the Florida Keys as a wedding and honeymoon destination, will include gourmet dinners, a secluded picnic on a private island, a sunset sail aboard a historic tall ship, luxurious spa treatments, a night-sea Stargazers' Cruise, and stays at exclusive small inns throughout the Keys.

To explore the visual and performing arts, which add so much flavor and romance to the destination, journalists will visit regional galleries, kayak the backcountry, take an art tour of Key West incorporating visits to galleries and working artists' studios, attend musical and theatrical performances and expand their own creativity through a hands-on painting session. Throughout these experiences, they will have opportunities to interview artists and performers.

The trip will be open to journalists from a blend of publications focusing on romance and weddings, arts/culture and travel. Significant free time and individual assistance will be provided to allow the development of a wide variety of stories.

Kids in the Keys Press Trip

As family travel and learning vacations become more important aspects of the travel industry, the agency will host a Keyswide press trip for journalists who write for the family market. Each targeted journalist can bring one child on the trip, allowing them to write about the destination as experienced through the child's eyes as well as from the adult perspective. The trip will be planned for June to take place during Key West's family-friendly ChickenFest.

In each district of the Keys, journalists and their children will explore attractions and activities that appeal to families. Among activities, they'll snorkel in the Florida Keys National Marine Sanctuary, peruse the Florida Keys Wild Bird Center, feed tarpon in Islamorada visit the Children's Museum at Crane Point Hammock in Marathon, see the Blue Hole on Big Pine Key and visit the Pirate Museum in Key West. They'll also make chicken costumes, march in the Poultry in Motion Parade and help judge a chicken look-alike contest during Key West's quirky ChickenFest.

Meeting Publications Media Trip

This trip is designed to highlight properties from Key Largo to Key West that offer facilities for groups. It will also peruse tourism-related offerings in the Keys that cater to the meetings and incentive market.

Mature Audience Publications

To boost visitor flow during August and September a media trip targeting writers of upscale mature audience publications will be conducted.

"Own a City" Campaign

In conjunction with the advertising agency and TDC sales, the agency aims to develop an "Own a City" campaign in the greater Washington D.C. area. The region is saturated with the Florida Keys marketing message during a short time period. The agency would make an effort to penetrate media venues including the market's newspaper travel or feature section as well as broadcast and Internet venues.

Individual Media Research Trips

The agency works with domestic media representatives on an individual basis; creating and arranging custom story-gathering media research trips. The agency stands by, ready to provide needed support. This can range from simply providing reporters a media kit to personally accompanying press representatives while in the destination. Those journalists and media outlets unknown to the agency that request complimentary or reduced-rate accommodations and other services are researched and qualified by the agency and its affiliates.

Other Media Research Trips

The agency works with Visit Florida, other Florida TDCs/CVBs and other organizations in conducting joint-venture media research trips as defined by their marketing plans.

Website

The PR agency manages two sections of the Keys Web site.

The first, general destination news, a/k/a Newsflash that is geared to the public. This covers all aspects of the destination ranging from cultural activities, special events, attractions, diving and snorkeling, capital improvements, fishing tournaments and spot news opportunities.

Material for generic sections of the website is provided to focus on the history of each district, the artists and writers who have found creative inspiration in each district, and mini-profiles of some of the colorful characters who inhabit each district.

In 2005-'06, a monthly e-newsletter will be produced in conjunction with floridakeys.com to provide vacation news to Keys Web visitors who opt in to receive additional information.

The second section of the website is specifically produced for media trade representatives. Use of the World Wide Web has grown exponentially during the past several years and has finally become a staple tool for newsrooms. Continued efforts are made to upgrade the media center of the website with the addition of more releases and photography with a continued eye to eventual broadcast-quality video clip distribution.

Electronic Distribution of Media Materials

The agency has shifted all domestic news release and picture dissemination to electronic mail, not only providing greater cost-effectiveness, but also resulting in speedier communications. The agency continues to use and research new, Internet-based release distribution systems. The agency is examining venues to move broadcast-quality video in this manner as well.

Videotape Library/High-Definition Television

The agency maintains a videotape library that includes generic offerings, special events and a separate cultural and heritage B-roll reel that provide excellent visuals for television production. Through contacts with travel and general media, editorially oriented Keys videography continues to increase television story placement opportunities. High-definition television broadcasting is beginning to be prevalent among U.S. broadcasters and more program producers are using this format for the creation of broadcasts. The timing is right for the Florida Keys to have a B-roll library consisting of high-definition footage, thus budget is identified for such a project in this year's plan.

News Releases

Agency plans to research and distribute domestic releases to appropriate media focusing on the following topics in 2005-'06: At least four "What's New in the Keys," featuring new tourism offerings and seasonal packages; a 2005-'06 calendar of events; and a number of generic releases focusing on cultural and heritage opportunities. The "What's New" releases continue to provide the best opportunities for coverage of news that specifically relate to the Keys private sector.

As well as ongoing coverage of annual events, festivals, fishing tournaments and activities throughout the Keys, the following news releases will be scheduled for creation and distribution during the 2005-'06 year.

Offbeat Adventures in the Florida Keys — showcasing unique or “off the beaten path” activities that allow visitors a rich and diverse experience of the Keys. Visiting the Turtle Hospital (now open to the public), taking an excursion in the “Nautilimo,” fishing and savoring a “cook the catch” dinner at a local restaurant, learning about Key deer and exploring Civil War-era forts are among the experiences to be covered.

Keys Literary Landmarks — highlighting the number, variety and richness of sites associated with Key West’s literary legends. While the Hemingway House and Sloppy Joe’s are widely recognized, many sites of literary significance are not — such as Heritage House, the Blue Heaven, Casa Antigua, the Southernmost Mansion, Tennessee Williams’ home, Elizabeth Bishop’s home, the former site of Rhoda Baker’s Electric Kitchen where Hemingway enjoyed dining and Zane Grey’s tie to Long Key..

Kids in the Keys — offering a collection of attractions and activities that can be enjoyed by visiting children and families. These will include feeding the tarpon at Robbie’s Marina, interacting with marine mammals, Crane Point Hammock and its children’s museum, watching Key West’s nightly street carnival at the Sunset Celebration, participating in art classes or learning experiences offered by area museums, fishing aboard party boats and discovering watersports activities particularly suited for children.

Romancing the Keys — exploring the elements that make the Florida Keys not only a wedding and honeymoon destination, but also a destination for anyone seeking to spark, celebrate or renew a romance. Gourmet candlelit dinners, luxurious spa treatments, secluded lodging properties, picnics on private islands and sunset sailing excursions aboard historic tall ships are among the attractions that will be covered in this piece.

Key West’s Architectural/Historic Gems — a natural outgrowth of the city’s recognition as a “Preserve America” community and one of the National Trust for Historic Preservation’s “Dozen Distinctive Destinations.” As well as touching on the island’s preservation standards, the release will cover lodging properties with outstanding historic and/or architectural features. These will include selected B & Bs, the Crowne Plaza La Concha (associated with Tennessee Williams), the Wyndham Casa Marina, the Southernmost House, the Curry Mansion and even some of the “haunted” inns.

Land, Air and Sea Adventures — designed to present active and soft-adventure travelers with a variety of energetic attractions to sample. The release will chronicle unique and adventurous activities available in each of the five Keys districts — such as parasailing, taking an aerial tour, marlin fishing, taking a fly fishing course, swimming with dolphins, kayaking the backcountry, participating in bicycling challenges and even competing in races such as the Seven-Mile Bridge Run.

Art Abounds in the Florida Keys — focusing on the diverse array of visual artists throughout the Florida Keys, from outdoor muralists to painters to skilled crafters to the sculptors who exhibit at Fort Zachary Taylor’s “Sculpture Key West.” Studio galleries where visitors can view artists at work will be highlighted, as will annual art and craft shows. Special emphasis will be placed on internationally renowned Keys artists such as the late Mario Sanchez.

New Meeting Facilities/Programs in the Florida Keys – a semi-annual story focusing on new additions in the Keys for meeting planners.

Spot News

As in past years, the focus of spot press coverage has been on activities occurring during appropriate festivals and special events. Upcoming coverage of events will continue to be strong, but will continue a focus on historic and cultural elements inherent in the events. Any significant news event that has a tie to create a favorable image for the Florida Keys is maximized by the agency.

Travel Trade Public Relations

The agency strives for placement of Florida Keys news items in travel trade publications. At least four times annually it surveys hotel associations, chambers of commerce and other sources for tourism infrastructure improvements that provide meaningful news. Results are distributed to appropriate travel trade sources.

Stories regarding major Keys events are rewritten for travel trade publications and the agency attempts to maintain high awareness of the TDC's sales and marketing staff.

The agency also plans on-site public relations support of TDC sales efforts at targeted US travel trade shows.

Local PR Support

The agency contracts with a correspondent in the Upper/Mid Keys and its account executive is based in Key West. These in-Keys personnel enhance story-material gathering, provide personalized assistance to journalists (i.e., providing story ideas and setting up interviews), cover local and spot news events, attend District Advisory Council meetings, umbrella committee meetings and assist in other important aspects of the public relations plan.

Special Events

Special events play a major role in the Tourist Development Council's public relations plan. Besides providing a "draw" for visitors, many events are creative, indigenous to the Florida Keys and are proven vehicles that attract media attention. Allotment of time is based on each event's uniqueness and ability to serve as a draw for overnight visitors or to bolster the marketing awareness of the destination. A line-item in the expense budget provides PR expenses for indigenous and PR-worthy Keys events that lack appropriate support funds.

PR efforts will be emphasized on events that incorporate historical and cultural elements — thereby continuing to support and showcase the Keys' rich history and cultural environment.

Broadcast Support

The agency has allocated funds to provide discretionary support for radio and television points planning to execute live or taped broadcasts from the Keys. In the past, these have included such shows as "Good Morning America," CBS's "Early Show," PBS, ESPN, OLN and other national and regional programs. The agency will continue seeking various national cable television shows to focus on Keys cultural and heritage topics.

Collaboration With Other Industry Professionals

The agency assists and consults with public relations directors and firms that represent private resorts and attractions in the Florida Keys & Key West. Our liaisons, which have proven beneficial to the Keys in the past, also include public relations contacts at the Visit USA offices, Visit Florida and other tourist development councils and tourism boards as well as colleagues at airlines and cruise lines serving the Keys. Account Supervisor Andy Newman is a member of Visit Florida's marketing steering committee, providing the Keys additional input resources for state marketing.

Representation at Journalist Conferences

SNA is one of only 10 agencies nationally with two members in the influential Society of American Travel Writers. The agency traditionally represents the Keys at one regional conference and at the national convention. The agency also executes exclusive Keys representation at the annual Florida Outdoor Writers Association Conference and Outdoor Writers of America Convention.

Cooperative Promotions

To further stretch the PR budget, the agency will continue to seek appropriate private-sector partners for promotions such as media familiarization tours. The agency will also seek other compatible Florida destinations to cooperate with fairs and promotional projects organized in key markets.

Media Blitzes

Agency will participate with Visit Florida in selected joint media blitzes and receptions in markets they plan to feature in 2005-'06. The agency also traditionally organizes an annual media blitz in conjunction with Monroe County Emergency Management in advance of the annual Atlantic hurricane season.

District Programs

The agency's liaisons in the Upper/Middle Keys and Lower Keys/Key West help identify and produce specific area features and assist in moving journalists on individual story-gathering research missions.

Umbrella Programs

The agency will provide public relations support, as needed, to the Fishing, Cultural and Dive Umbrellas. Separate public relations expense funding is delineated in the umbrellas' respective budgets to promote events and each specialty market.

Gay/Lesbian Market Public Relations

The Keys continue to create a top of mind awareness which is critical to any destination hoping to cash in on the estimated \$54 million in spending that the US GLBT domestic travel market represents. Many destinations are copying past efforts of this destination and are fueled by funds from city, county, state, and, in Europe and Canada, provincial and government tourism offices. It is crucial to maintain and grow this profile.

The agency contracts with a Key West-based, Gay/Lesbian marketing specialist to provide media relations support for this market segment.

The PR program emphasizes the unique quality of the destination to the gay and lesbian market domestically and internationally, focusing on the overall acceptance of gay and lesbian visitors and the ways they blend into the community. Secondly, is the featuring of the unique style of accommodations available to gay visitors, as well as designed activities and events within the destination.

The agency will continue to maintain and distribute gay press kit editorial and photography. Offer information and input for articles in the GLBT and mainstream media as requested; provide accompanying photographs when appropriate.

Other activities include organizing an international and domestic gay media fam trip, focusing on unique lodging, attractions, and events, and the gay influence in the Keys and Key West.

Enhance Florida Keys presence at the September 7-10, 2006, National Lesbian & Gay Journalists Association annual convention being held in Miami Beach. Arrange a pre- and/or post-press familiarization trips to the Keys and Key West highlighting gay and mainstream activities. Arrange media presence and coverage at events including the PrideFest, New Years Eve and WomenFest.

Attract domestic gay and mainstream television shows to the Keys to highlight the destination and offerings which appeal to both gay and mainstream visitors.

PR Activity for Keys Tourism Industry

The agency will continue to produce an as-needed PR Alert, to inform hoteliers and other industry members of public relations opportunities. The PR Alert is electronically distributed. The agency also distributes tourism advisories to the Keys Tourism Industry.

Agency conducts presentations at Keys industry organizations to demonstrate how individual Keys businesses can tie in with TDC PR programs as well as incorporate public relations into their own business marketing plans

Crisis Management

Perhaps there is no better test of a communications plan than when a destination is directly hit or threatened by a crisis.

An existing, updated Hurricane Emergency Plan, which integrates the Keys tourism industry and community leaders, serves as a guideline in the event of a storm or other occurrence. Annually, the agency updates the plan and organizes a media blitz with and for the Monroe County Emergency Management Office.

In all situations, a relationship fostered with Monroe County Emergency Management provide dividends for the TDC, the industry and the visitor, and helped efforts to achieve a speedy economic recovery.

For 2005-'06, the agency again plans to attend the annual Governor's Conference on Hurricanes. The annual conference has a series of workshops and networking opportunities providing opportunities to gain additional communication skills and resources with local, state and federal officials. In addition, account supervisor Andy Newman has conducted a hurricane preparedness workshop for tourism interests at five past Governor conferences.

The agency has established a fax-blast network, voice-call alert system and e-mail transmission list to provide Keys lodging properties and tourism interests important information in the event of any emergency. To better aid the visitor and the Keys tourism industry, the agency seeks additional means to streamline communications to provide accurate information to properties and media.

Because advance planning is key to alleviating crisis situations, the agency – on behalf of the TDC – works in conjunction with the Lodging Association of the Florida Keys & Key West to organize a pre-hurricane season preparedness workshop for the tourism industry. The agency maintains excellent relationships with Monroe County law enforcement organizations to provide constant information interchange and coordinated responses to situations that might impact tourism flow.

Crisis management may be needed in situations that involve major traffic accidents, fires, environmental accidents and in other situations that has the potential to impact tourism flow.

International Public Relations Programs

United Kingdom and Europe

The aim of the United Kingdom/European PR program is to ensure increased and improved coverage for the Florida Keys in the United Kingdom and European markets. This is done with the help of a professional contracted PR agency in Europe.

Positioning of the Florida Keys & Key West:

Summary of Target Markets and Themes

The overall strategy is broken down into individual sections outlining mainstream and niche target markets. Themes for 2005/6 include active travel, responsible tourism (with a family focus), luxury travel, gourmet food and the wealth of events in the Keys. Particular attention is paid to broadcast media from a mainstream and specialist angles. A 'news' element will be apparent throughout where possible to keep the Florida Keys brand fresh.

Target markets:

- Family ties – The Florida Keys for the whole family
- Soft adventure activities
- Gay and lesbian travelers –highlighting the attractions for GLBT visitors
- Ecotourism
- Cultural tourist

Themes:

- Maintaining a news focus – ways in which the Florida Keys brand elements can be kept fresh with the use of innovative feature storylines
- Taking an active interest – soft adventure feature ideas
- Responsible travel – focusing on responsible breaks involving the whole family
- A taste for luxury – highlighting the range of properties in the Florida Keys and in particular the niche and boutique properties
- Going for gourmets – an emphasis on the cuisine unique to the Keys
- A passion for events – emphasizing the wealth of events in the Keys and encouraging year-round travel
- Targeting the Internet – exploring the various options within the online phenomenon

Summary of Day to Day Activity

Daily methods to achieve goals will include:

- Translation and distribution of press releases focusing on events and news
- Distribution of *What's New* releases, adapted for European marketplace when appropriate and condensed to bi-monthly e-newsletters
- Regular meetings with industry including Visit FLA, Visit USA, Cellet sales offices in UK and Germany
- Organize media functions at relevant trade shows (including WTM, BIT, ITB and TUR)
- Undertake PR opportunities in other European markets, including Scandinavia and the Netherlands
- Regular meetings with industry including Visit FLA, Get it Across, throughout Europe for joint media blitzes, joint ITB activities
- Placement of photo stories on special events
- McCluskey International will continue to build upon the destination's profile within the travel trade media, through the issuance of regular news stories, new product, airline and tour operator updates
- On-going operation of a full press office for trade, consumer and broadcast media enquiries

Positioning of the Florida Keys & Key West:

Target Markets (in-depth)

With each section the program aims to provide suggestions of story angles, pitches, itineraries and feature ideas. Efforts will be continually put forth to provide the media with fresh ideas to attract new visitors and providing compelling reasons for past visitors to make return visits.

We have also identified new markets, and the increased use of the internet in travel booking has led us to include more websites and portals in our PR planning. We have included an extensive online section to illustrate the breadth of opportunities available in this area.

We will continue to maximize partnerships with tour operators, airlines, car rental companies and hotels. In addition we will also seek to identify new partners with whom relationships can be developed. We will further develop relationships with the Florida Keys PR partners - particularly those which 'fit' and complement the Florida Keys core markets. We will work in partnership to develop joint itineraries and share costs for twin and multi- centre press visits.

Family Ties

As well as continuing to target well known family travel specialists, the agency would seek to explore opportunities for journalists to travel with their own school-age children and grandchildren. The children would then contribute in part their thoughts to the feature – so the feature would be written through the eyes of the child. At present a number of titles such as Sunday Times Travel Magazine, The Sunday Times (children's section of the Sunday Times) and the Independent on Sunday publish such features. The use of 'celebrity writers' such as well known actors and authors will be sought to expand this phenomenon further into titles such as The Mirror and The Mail on Sunday.

Visits would place emphasis on education as well as fun. Young guests can also participate in ocean and beach clean ups to promote an understanding of the precious marine environment with organizations such as Reef Relief and the National Marine Sanctuary and where possible rescue and release programs. Water based visits including learn to dive experiences such as PADI Junior Open Diver certifications can be part of itineraries as well as kayaking and soft adventure trips which promote fun and environmentalism for the whole family.

Keeping the Men Interested

The Keys offers an abundance of activities for the sophisticated male traveler seeking an active yet relaxing break. A series of 'active challenge' ideas would be produced and suggestions for media round-ups with a view to converting these into individual visits. These would include major fishing tournaments, moonlit kayaking and competitive sailing tournaments.

There has also been an overall rise in males taking more care of their appearance and health, something that is reflected in the national press and lifestyle glossies. The buzzword 'metrosexual' has been coined to describe men who actively look after themselves by visiting spas and undertaking treatments. Sample itineraries which include visits to spas as well as a general focus on health, well-being and self improvement of the body and soul.

Gay and lesbian travelers

The gay market continues to be important for the Florida Keys as gay and lesbian have a high disposable income and a propensity to travel. The Florida Keys is an extremely relevant destination for the GLBT community and international PR efforts will continue to highlight this.

Broadcasting the Keys

BBC Holiday

The time is right to target the BBC in the UK to feature the Keys within its flagship Holiday program. Themes suggested will reflect the ideas and activity mentioned above.

BBC Departure Lounge

Departure Lounge is a new venture for the BBC, and will be a weekly program on Friday nights at 7pm. Links are recorded on the Wednesday before broadcast so that the program can include latest topical news and last minute deals. Being an hour long, the program has a lot of airtime to fill. We have spoken to the producer about featuring a segment about cycling in the Keys.

GMTV This Morning

GMTV incorporates a number of programs and segments on weekdays between 7am and lunchtime on the ITV channel. There are a number of forthcoming opportunities, and efforts will be made to liaise with the relevant producer to ensure ideas are pitched.

Richard & Judy

'Richard & Judy' (they are husband and wife) is a daily, live hour-long show covering a mix of breaking news items, human interest stories, travel and celebrity interviews. It currently reaches a daily audience of between two and three million viewers, compiled of 40% ABC1s and 60% C2DE. 85% of the viewers are between 35 and 60 years old, 65% of whom are female and 35% male.

The show's annual book club and Summer Read have been credited with being more influential and significant to the British publishing industry than 'The Booker Prize'. In fact Summer Read '04 was an overwhelming success catapulting all six books into the Amazon top ten. Six high profile celebrities read the books and are then whisked off to six idyllic summer holiday destinations to describe the books on camera. The film on location is edited to 3 minutes for the live show and is followed by a 12 minute studio chat about the book. We will target the show to feature a book set in the Florida Keys, or an Ernest Hemingway novel should they change their focus from new launches. The producer showed an interest in introducing a 'classics' segment, so we will pursue this further.

BBC Great Food Live

Great Food Live is UK TV Food's flagship daily 90-minute live show, aired every day – Monday to Friday. UK TV Food broadcasts the program 7 days a week from 7am to 7pm on Sky Digital and other cable networks.

Broadcast Media - Germany

An effort to organize in conjunction with Visit Florida Germany for a German travel program to visit and film in the Florida Keys will be made.

Positioning of the Florida Keys & Key West: Target Markets (in-depth)

Maintaining a News Focus

The media is becoming more and more news focused, with features most often centering on new experiences, itineraries and lodging properties. Each of the national daily and Sunday newspaper travel supplements have a substantial news section within each issue presenting limitless opportunities for editorial while keeping the Florida Keys brand fresh and current. Efforts will continue to report on obvious things like new product entities.

As well as issuing news via press releases, the UK/European program, in 2005-'06, will feature a dedicated e-newsletter that would be emailed out regularly to a media database. The newsletter would condense the seasonal 'what's new', with a tour operator call to action. The newsletter should be regular enough to maintain a presence in the media's memory, however not too often so as the media feel swamped with information. We therefore suggest a bi-monthly e-newsletter. This could focus on the UK & European markets and could feature specific news stories, new itinerary ideas and latest offers and deals from relevant travel partners.

Taking an Active Interest

The Keys offers an abundance of activities for the active traveler and the program will emphasize the wide range of activities including fishing, kayaking, sailing, snorkeling and diving while demonstrating the specialist aspects of each region i.e diving in Key Largo and sport fishing in Islamorada.

Emphasis will be placed on soft-adventure and itineraries will introduce the diverse regions of the Florida Keys to first timers who perhaps have not undertaken activities such as diving or fishing before. Fishing itineraries would allow individuals to experience offshore and back country fishing as well as adding an element of participation such as entrance into several fishing tournaments.

Responsible Tourism

This trend of responsible tourism is becoming more popular. A concerted effort to focus on the issues involved can only pay valuable dividends in the future. Generally, the definition of responsible tourism is more concerned with respecting nature and culture and sometimes defined as geotourism.

Individual itineraries will be developed which promote positive cultural and environmental practices with an insight into the practices of organizations such as Reef Relief and the Florida Keys National Marine Sanctuary. Examples would encompass visits to John Pennekamp State Park, Bahia Honda State Park and educational guided tours through the mangroves, wetlands and seagrasses.

2005 has been named 'Year of the Volunteer' in England and to coincide with this the agency would organize a series of hands-on visits to coincide with dolphin release programs, organized clean-ups by Reef Relief and Reef Relief Awareness Week (July) and the Florida Keys National Marine Sanctuary as well as visits to the Key West Wild Bird Center and the Turtle Hospital in Marathon.

A Taste for Luxury

The luxury segment is key for the UK market, and as yet relatively under-employed in the Florida Keys European PR activities. With the increase in top quality luxury properties in the Keys, the program will aim to target a new market of specialist writers and thereby create a new focus for travel to the destination.

In implementing this new luxury travel angle, the program will seek to incorporate appropriate elements of activities available in the Florida Keys to emphasis the 'experiential' slant that is currently particularly relevant to the UK market. The properties' spas also provide a clear opportunity that is well suited to the luxury market.

The concept of luxury travel also opens up new opportunities to explore methods of transport around the Keys, for example via chartered boat or aircraft, providing a new alternative to the traditional 'road-trip' through the islands. An effort to incorporate such options to increase the variety of coverage possible, and to target specialist luxury media.

Going for Gourmets

The last 12 months has seen a proliferation in specialist food and travel titles in the UK and Europe. Media research trips would be coordinated to take advantage of the presence of these new publications. Focus would be placed on seasonal flavors, conch recipes and specialties. Itineraries would include traditional signature dishes such as crab cakes, conch fritters and Key Lime Pie as well as highlighting alternative options such as vegetarian cuisine. Itineraries are to be developed with a 'hands-on' element to allow visitors to gain a local flavor, with focus on specific restaurants and chefs). Groups will visit local producers and suppliers to gain 'insider tips' and themed itineraries would be created with menu sampling combined with fishing trips where groups cook their 'catch of the day'.

A Passion for Events & Festivals

Events and festivals are a key element of the Florida Keys and the year round calendar of events can provide a hook for European media relations and visiting journalist activities. Many of the national travel sections and travel magazines publish a diary page which are targeted by 'selling in' events to these pages. To complement this, the Visiting Journalist Program will aim to tie each group visit in with a relevant festival or event.

In addition to dedicated trips for specific events such as PrideFest, itineraries would also be themed to offer a 'Flavor of the Florida Keys' where different activities are juxtaposed with others. Itineraries focusing on different aspects of the Florida Keys would potentially include 'Fine Arts and Fantasy in the Florida Keys' in October/November 2005 to coincide with Key West Old Island Days and FantasyFest with visits to properties with an arty feel.

As soft adventure and water-based activities such as fishing and diving are fundamental to the Florida Keys experience, the agency will target journalists to visit for the coral spawning season and to experience (and participate in where possible) relevant fishing competitions.

Trade Shows & Exhibitions

While shows like WTM remain popular, there is a risk that they can become formulaic. In order to stand out, we need to add an element of 'wow factor' to the program. This would be in the form of a specific news story or announcement to the consumer and trade media during a media breakfast to stimulate news coverage and 'kick start' WTM. Past experience has demonstrated the majority of the quality media attend WTM on the opening day so a media breakfast would be hosted for key media in 2005 following the success of the 2004 breakfast.

A presence will also be maintained at other trade shows and industry events in Europe such as ITB in Germany in March and See America Week in the UK in June.

The agency will also continue to work with Cellet Travel Services for regular exchange of information as well as continuing to seek out creative ways in which to work together at WTM and throughout the year.

Targeting the Internet

The online element of the UK/European PR plan will be increased to reflect the changing technological environment. Travel holds a special draw for the internet user, and there are, as a result, significant opportunities to tap directly into the wallets of consumers. Travel booking sites have long been popular, however recent years have seen an increase in the popularity of content-based websites in the markets. The program would seek to target a number of popular lifestyle and travel websites. In addition to this the national press travel news pages as well as popular travel pages would be key targets. Finally, a number of UK/European Web sites that focus on worldwide special events would be targeted for Keys events.

Newsletter 2005-'06

The agency works closely with Cellet Travel Services (sales) to create content for an annual newsletter utilized for foreign and domestic markets.

Other Foreign Markets

Latin America

The agency plans to participate in the La Cumbre de Turismo travel trade show. La Cumbre traditionally attracts nearly 100 journalists from throughout Latin America and the United States. The agency also traditionally attracts Despierta America, the top-rated morning television show in American and Latin America, to execute a live broadcast from the Keys each summer. The agency will continue on-site PR support at Travel Industry of America's Pow Wow. Pow Wow attracts a significant number of Latin American journalists and is a very important event that brings together more than 300 foreign travel journalists.

Japan

Agency will continue to utilize Travel South public relations professional as a media conduit for the intermittent distribution of Keys information, as well as a clearinghouse for media visits. The agency plans to produce a half-page feature for a quarterly Visit Florida electronic newsletter for Japanese markets. Originally, the agency planned to do this during FY 2005-'06, but Visit Florida put the project on hiatus.

MEASURABILITY

The agency contracts with a national clipping service to monitor public relations efforts. Rather than producing volumes of clip books, the agency now showcases original clips at TDC meetings to inform the council of results. The agency will provide the TDC with analysis of various media projects to provide dollar value of coverage received. Although comparative costs can be achieved, based on media rate cards for time and space, it is difficult to assess the value of increased credibility and readability editorial materials generally garner.

Preliminary Public Relations Expense Budget for FY' 2005-'06

Media materials (Media kits, releases, photo reproduction, CDs, etc.)	\$9,500
Postage and FedEx	\$8,000
Electronic Materials Distribution	\$7,000
Print clipping and broadcast monitoring services (evaluation process)	\$10,000
Japanese Newsletter	\$2,000
Special events support (those with inadequate funding)	\$75,000
Broadcast support	\$60,000
Travel journalist, other conferences	\$15,000
Domestic and foreign media research trips (includes allocation for air transportation, food, etc.)	\$85,000
PR Alert and miscellaneous in-county	\$2,000
Domestic media development missions	\$18,000
Spot News Coverage	\$60,000
UK/European sub-agency contract	\$125,000
UK/European PR expenses	\$100,000
High-Definition Television B-Roll Shoot	\$20,000
Web Site Editor	\$27,000
NGLJA Convention	\$8,500
Ameurop Assistance Program	\$18,000
PR stringer expenses	\$5,000
Gay market PR Stringer	\$12,000
Resources	\$15,000
Total Proposed PR Expense Budget for FY 2005-'06	\$682,000

(District PR Stringer Program (funded from DAC Third Penny)..... \$60,000)

Monroe County Tourist Development Council 2005-2006 Marketing Plan

OCTOBER 2005												
GENERAL PR EFFORTS						SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance / Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage /Results	District/ Umbrella
TDC Regular Meeting												
DAC Regular Meetings												
DOMESTIC												
2006 Keys Fishing Tournament Schedule												
Halloween Events Roundup												
New Meeting facilities/program in the Keys												
INTERNATIONAL												
Gourmet Keys Roundup Press Release												
EVENTS												
Oktoberfest												
Indian Key Festival												
Goombay Festival												
Birding & Wildlife Festival												
Underwater Pumpkin Carving												
Fantasy Fest												
Opening of Stone Crab Season												
Mercury Baybone Celebrity Tournament												
Mercury Outboards' Bonefishing World Champ. /Isle. ALL-Tackle Bonefish Tourn.												
Women's World Invitational Fly Championship Bonefish Tournament												
Ladies, Let's Go Fishing! Take Stock Backcountry Challenge												
Action Craft's Annual Owners Tournament												

Monroe County Tourist Development Council 2005-2006 Marketing Plan

NOVEMBER 2005												
GENERAL PR EFFORTS						SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research Fam	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting												
DAC Regular Meetings												
DOMESTIC												
What's New Winter 2006												
Holiday Boat Parades Press Release												ALL
Christmas in the Keys Press Release												ALL
2006 Calendar of Events												ALL
INTERNATIONAL												ALL
World Travel Market (UK)												
What's New Winter 2006												ALL
EVENTS												ALL
Key West Old Island Days												
Island Jubilee												I
Key West Offshore World Championship Powerboat Races												V/C
Corvettes in Paradise												I
Pirates in Paradise												IV
Skydive Marathon												I
Marathon Bike-a-Thon												III
Mercury												III
Cheeca/Redbone Celebrity Tournament												IV/F
George Bush Cheeca Lodge Bonefish Tournament												IV/F
Islamorada Sailfish Tournament												IV/F
Islamorada Fishing Club Junior Derby												IV/F

Monroe County Tourist Development Council 2005-2006 Marketing Plan

DECEMBER 2005												
GENERAL PR EFFORTS						SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research Fam	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting						•						
DAC Regular Meetings					•	•						
DOMESTIC												
Key West's Literary Landmarks Press Release			•									I/C
INTERNATIONAL												
2006 Calendar of Events			•									
EVENTS												
Lighted Boat Parades												ALL
Key West Symphony Orchestra Performance							•					ALL
Key West Holiday Parade							•					I/C
New Year's Celebrations							•					I
Lower Keys Winterfest							•		•		•	ALL
Old Island Days Holiday House Tours							•		•			II
Ocean Reef BTU							•		•			I/C
Backbone Classic							•				•	V/F
Key West Kwanzaa							•					I/C
Islamorada Junior Sailfish Tournament							•				•	IV/F
Islamorada Sailfish Tournament							•				•	IV/F
Islamorada Fishing Club Captain's Cup Sailfish Tournament							•				•	IV/F
Mercury/Cheeca Redbone Celebrity Tournament							•				•	IV/F
Metropolitan South Florida Fishing Tournament Mini-Met							•				•	ALL/F
Captain Don Gurgiole Sailfish Tournament							•				•	IV/F

JANUARY 2006													
GENERAL PR EFFORTS							SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella	
TDC Regular Meeting													
DAC Regular Meetings													
DOMESTIC													
Literary Legends and Creative Cuisine Press Trip													
Adventure Travel Show													
New York City													
Romancing the Keys Press Release													
INTERNATIONAL													
Pre-FI Huddle Media Fam													
Romance Package													
Valentine's Day Press Release													
EVENTS													
Old Island Days House & Garden Tours													
Sculpture Key West's Art in the Park													
Hammocks State Park Lecture Series													
Key West Symphony Orchestra Performance													
Tradewinds Catamaran Regatta													
Art Under the Oaks													
Key West Race Week													
Paws for a Cause													
Key West Literary Sem.													
Florida Keys Medieval Festival													
Key West Craft Show													
John Muscarello Kingfish Challenge													
Key Largo Sailfish Chall.													
Key West Kingfish Extravaganza													
Cheeca Presidential Sailfish Tournament													
Over the Hill Rip Off													
Hog's Breath King Mackerel Tournament													
Islamorada Fishing Club													

[illegible]

FEBRUARY 2006												
GENERAL PR EFFORTS						SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting					•	•						
DAC Regular Meetings					•	•						
DOMESTIC												
Art of Romance Press Trip					•							
Kids in the Keys Press Release	•		•									ALL
Adventure Travel Show												ALL
Washington D.C.			•		•							ALL
INTERNATIONAL												
Family Keys Round-up												
Press Release							•					ALL
EVENTS												
Key West Symphony												
Orchestra Performances							•					I/C
Pigeon Key Art Festival							•			•		III/C
Sweetheart Arts & Crafts Festival							•					IV/C
Islamorada Chamber House Tours							•					IV
Civil War Heritage Festival							•			•		I
Old Island Days Art Festival							•					I/C
Islamorada Women's Sailing Tournament							•		•		•	IV/F
Captain Leon Shell Memorial Billfish Tournament							•				•	III/F
Islamorada Fishing Club Kingfish Tournament							•		•		•	IV/F

MARCH 2006													
GENERAL PR EFFORTS						SPECIAL EVENTS PR EFFORTS							
	Media Support	Media Research Fam	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting						•	•						
DAC Regular Meetings						•	•						
DOMESTIC													
What's New Spring 2006				•				•					ALL
Meeting publications press trip.		•											ALL
INTERNATIONAL													
ITB Berlin	•					•							
TUR	•					•							
What's New Spring 2006													ALL
PrideFest 2006 Press Release				•									ALL
EVENTS								•					I
Historic Seaport Music Festival								•					I/C
Marathon House & Garden Tours								•					III
Key Largo House & Garden Tours								•					V
Conch Shell Blowing Contest								•	•	•	•	•	I/C
Marathon Seafood Festival								•		•			III
Rites of Spring Art/Craft Show								•					III/C
Underwater Easter Eggs								•			•		V
Del Brown Invitational Permit Tournament								•				•	I/F
Mercury Celebrity Sunset Tarpon Tournament								•				•	III/F
Key West Fishing Tournament Kickoff								•				•	I/F
Islamorada All-Tackle Spring Bonefish Tournament								•				•	IV/F
Backbone Lures "Fish 'til you Lose it" Tournament								•				•	IV/F

APRIL 2006													
GENERAL PR EFFORTS							SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance / Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella	
TDC Regular Meeting						•							
DAC Regular Meetings					•	•							
DOMESTIC													
Own a City Campaign			•		•							ALL	
Mature Travelers Press Trip	•											ALL	
Offbeat Adventures in the Florida Keys Press Release			•									ALL	
INTERNATIONAL													
Underwater Music Festival Press Release							•					II	
Hemingway Days Press Release							•					I/C	
EVENTS													
Bay Jam													
Earth Day Round Up							•			•	•	V	
Long Key Bike-Kayak Event							•				•	ALL	
Robert Frost Poetry Festi							•					III	
Lower Keys Jazz Fest							•					I/C	
Taste of Key West							•					II/C	
Seven Mile Bridge Run							•			•	•	I	
Taste of Islamorada							•				•	III	
Conch Republic							•			•	•	IV	
Independence Celebration							•			•		I	
World Sailfish Tournament													
Ladies Tarpon Tournament							•				•	I/F	
Ghost Hunt Tournament							•				•	III/F	
Mercury Celebrity Sunset Tarpon Tournament							•				•	V/F	
Key Largo Dolphin, Wahoo & Tuna Tournament							•				•	III/F	
Key Largo Dolphin Tournament							•				•	V/F	
Key West Classic							•				•	V/F	
							•				•	I/F	

MAY 2006													
GENERAL PR EFFORTS							SPECIAL EVENTS PR EFFORTS						
	Media Support	Media Research Fam	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting						•	•						
DAC Regular Meetings						•	•						
DOMESTIC													
Update Hurricane Plan; Media Blitz with Emergency Management and Conferences; Keys Workshop			•	•					•				ALL
New meeting facilities/ Program in the Keys			•	•	•				•				ALL
INTERNATIONAL													
Pow Wow Orlando	•	•											ALL
Pow Wow Press Trip		•				•							ALL
Wedding and Honeymoon Round-up Press Release						•		•					ALL
EVENTS													
Barley Bay Festival								•				•	V
Truman Legacy Symposium								•			•		I/C
Island Festival/Taste of Key Largo								•					V/C
Key West Songwriters' Festival								•		•			I/C
Marathon Offshore Grand Prix								•		•		•	III
Rolex/IFGA Inshore Championship								•				•	IV/F
Marathon Int'l Tarpon Tournament								•				•	III/F
Golden Fly Tarpon Tournament								•				•	IV/F
Coconuts Dolphin Tournament								•				•	V/F
McDonald's Invitational Tarpon Tournament								•				•	III/F
Dolphin Masters Invitational								•				•	I/F

JUNE 2006													
GENERAL PR EFFORTS							SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research Fam	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella	
TDC Regular Meeting					•	•							
DAC Regular Meetings					•	•							
DOMESTIC													
Hurricane Preparedness Workshop for Tourism Ind.			•		•							ALL	
What's New Summer 2006			•										
Domestic and Pan-European Gay Press Trip	•				•								
Kids in the Keys Press Trip	•				•							ALL	
INTERNATIONAL													
Coral Spawning Press Release	•						•					ALL	
What's New Summer 2006			•				•					ALL	
EVENTS													
Cuban Am. Heritage Fest.													
Key West ChickenFest							•					I/C	
PrideFest Key West							•		•	•	•	I	
Tropical Fruit Fiesta							•		•	•	•	I	
Cancer Foundation Dolphin Tournament							•					I	
Don Hawley Invitational Tarpon Tournament							•				•	II/F	
Islamorada Fishing Club Dolphin Tournament							•				•	IV/F	
Women's World Invitational Tarpon Fly Champ. Series							•				•	IV/F	
Big Pine & Lower Keys Dolphin Tournament							•				•	II/F	
Father's Day Dolphin Derby													
Gold Cup Tarpon Tournament							•				•	III/F	
Key West Gator Club Dolphin Derby							•				•	IV/F	
Dick Fuhr Memorial Dolphin Tournament							•				•	I/F	
Key West Fishing Tournament							•				•	III/FW	
Swordfish Tournament							•				•	IV/F	
Burdines Waterfront Dolphin & Blackfin Tuna Tournament							•				•	IV/F	
Coconut Cove Resort Dolphin Tournament							•				•	IV/F	

JULY 2006												
GENERAL PR EFFORTS						SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research Fam	Media Develop, Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting												
DAC Regular Meetings												
DOMESTIC												
Lorian Hemingway Book Debut: "Key West, the Pirate Heart"												
Offbeat Adventures Press Trip												
INTERNATIONAL												
Fantasy Fest Press Release												
EVENTS												
Coral Spawn												
Great American Fish Count												
Underwater Music Festival												
July 4 Firework Round up												
Mel Fisher Days												
Reef Awareness Week												
Hemingway Days Festival												
Key West Summer Food & Wine Festival												
Drambuie Key West Marlin Tournament												
Key West Fishing Tournament's Flats SLAM												
Holiday Isle Dolphin Tournament												
Conch Republic Ladies' Dolphin Tournament												
Ladies' Reel at the Reef												
IFC Red Ghost Stalk												
Geiger Key Dolphin Tournament												

AUGUST 2006												
GENERAL PR EFFORTS						SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance / Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting												
DAC Regular Meetings												
DOMESTIC												
Land, Air and Sea Adventures Press Release												
Art Abounds in the Florida Keys Press Release												ALL
INTERNATIONAL												ALL/C
Oktoberfest Press Release												
EVENTS												
Key West Summer Food & Wine Festival (cont'd.)												I
Mercury Little Palm Island Grand Slam												I/F
Coral Reef Spawning												All

Monroe County Tourist Development Council 2005-2006 Marketing Plan

SEPTEMBER 2006												
GENERAL PR EFFORTS						SPECIAL EVENTS PR EFFORTS						
Media Support	Media Research Fam	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting					•	•						
DAC Regular Meetings					•	•						
DOMESTIC												
Key West's Architectural/Historic Gems Press Release			•				•					I/C
National Gay & Lesbian Journalist Association Convention in Miami Beach	•	•	•									I/ALL/C
INTERNATIONAL												
Winter Sun Round-up Press Release							•		•			I
EVENTS												
WomenFest												
Mercury S.L.A.M. Celebrity Tournament							•					I/C
Marathon Int'l Bonefish Tournament							•				•	I/F
Islamorada Fall Fly Bonefish Tournament							•				•	III/F
Mercury Baybone Celebrity Tournament							•				•	IV/F
							•				•	V/F

L. FLORIDA KEYS and KEY WEST FILM COMMISSION

Purpose

The purpose of the Keys Film Commission is to bring awareness of our location to the film, television, video and print industry. Additionally the Film Commission provides assistance and support to productions shooting in the Keys. The Film Commission may also provide necessary information, props or signage to assist a production company in creating a story that references Monroe County.

Objectives

1. Through marketing and advertising, to be pro-active in bringing a greater awareness of Florida Keys locations to the production industry.
2. To provide assistance when production companies are on location in the Keys.
3. Provide story ideas, events, flora and fauna, attractions and lifestyles and historical information to scriptwriters.
4. Provide local production job opportunities.

Goals

1. Create a video page for the filmkeys.com website.
2. Create a film industry ad campaign with Tinsley Advertising.
3. Increase marketing efforts in the international film production industry.
4. Develop a familiarization trip (FAM) for feature film and television location managers.
5. Increase efforts to television production industry.
6. Develop marketing efforts to the video gaming industry.

Implementation

Film Florida

Film Florida is an organization that was founded to promote Florida as a film destination and is made up of State film commissioners, labor unions, individuals and businesses catering to the film, television and print industry. Our Film Liaison served on the Film Commissioners Council and sat as a voting member on the Film Florida Board in 2004 -2005. Our presence will continue with Film Florida in 2005 -2006. Our Film Commission in conjunction with Film Florida will organize a New York marketing mission plus one or two other marketing receptions during the upcoming fiscal year.

Website

The Florida Keys & Key West Film Commission will be making improvements to its current website, www.filmkeys.com. We have taken comments and suggestions from film industry location managers and production executives in order to create a site that is geared toward their needs. The site, over the past year, has been revamped with a new look and greater user friendly access. We also employed the services of one of Los Angeles' top location managers to increase our on-line library. We now have pictures of every bridge in the Florida Keys along with additional houses, roads, marinas, docks, parks and other available locations throughout the Keys.

For the 2005 –2006 fiscal year we intend to create a video page on our site which will offer film makers an opportunity to showcase short works shot in the Florida Keys. As a project goes up on the video page an e-campaign will precede it encouraging industry professionals to view the video. Once on the site, we expect people will take the time to look through our location photos and location video.

We continue to use the services of Production Point, a locations website geared to domestic as well as international clientele. We also continue our presence on the Kemps website. Kemps is an internationally distributed handbook of production services for the film, television and commercial industry. Last year they created a website for queries to film commissions and services advertising in their book.

Advertising/Marketing Campaign

The Film Commission will continue its presence in the international markets. We will partner with Film Florida in creating a London Mission to reach out to UK producers and directors. While the dollar remains relatively weak against the pound and with our new state film incentive we have more to offer the UK and the EU than great locations and perfect winter weather. To this end we will develop with Tinsley Advertising a print campaign to target Europe as well as the domestic market.

New Marketing Tools

The Governor signed the budget making available on July 1, 10 million dollars for Florida's Film Incentive plan in the Governor's Office of Film and Entertainment. Film commissioners and those who work in the industry are thrilled with the increase in the incentive money from \$2.4 to \$10 million. The State government understands how important and lucrative an industry this can be in Florida. As far as marketing tools, the incentive is the best thing going.

Familiarization Trip (FAM)

The Film Commission will put together a FAM trip of film and television location managers and producers. The target group would be those who are unfamiliar with the Keys or those who tend to look at the Caribbean because they do not realize the extent of our locations and easy access. We will aim for a group of three to five people to spend three or four nights throughout various districts of the Keys to have an opportunity to see our diverse locations.

Increase Efforts to Television Commercial Industry

The Film Commission will obtain a data base of top ad agencies who produce television commercial spots. We will create e-postcards with direct links to the www.filmkeys.com website.

We will also add agency reps to our invitation list for our marketing effort in New York.

Develop Marketing Efforts to the Video Gaming Industry

The video gaming industry is a fast growing high end industry. The developers are looking toward real locations in the creation of backdrops for the games. In using mostly still images they create 360° environments for the games. The film office will reach out to this segment of the industry through our marketing receptions and e-postcards.

Industry Trade Shows

Trade shows are venues where the Film Commission has an opportunity to promote what is available in our destination directly to production companies. Attendance at the following trade shows is proposed for fiscal year 2005 - 2006.

1. **Location Expo** is scheduled for Los Angeles in February, attendees include location managers, location scouts, writers, producers, and directors.
2. **Film Florida Conference** is scheduled each May or June. This is an annual meeting and seminars where industry professionals are invited speakers. It is also at this time that the council officers and executive board is voted on.

3. **New York Mission** - We plan another New York Mission this year scheduled for autumn. The Florida Keys Film Commission will again coordinate the reception for independent film makers in the East Village, New York. Attendees are to include producers, directors and executives from the film and television industry.
4. **Los Angeles Mission** – The Film Commission plans to partner with the Governor's Office of Film & Television to coordinate a reception for Los Angeles film makers who came from Florida or attended Florida Universities. It will be a way to keep Florida on the minds of film makers and also find out from them what they require in order to make films here.
5. **Film Festivals and Sales Missions** - Regional Film Commissions are considering opportunities to partner with the State Film Commission and production and distribution companies to bring awareness of Florida as a film destination. Targeted attendees are producers, directors and executives in the film and advertising industries.
6. **London Broadcast Production Show** – This trade show takes place in late May or early June. The Florida Keys Film Commission has been coordinating this show for Film Florida during the past two years. This office will continue in said capacity for the 2006 show.

Location Scouts

Once a production company has been supplied with location photos, video and requested information, the production company may send a location scout or location manager out to take photographs of the areas the company is interested in. On these occasions the Film Liaison meets with and/or escorts the location scout to the possible shoot sites in Monroe County. At times this effort requires the hiring of a helicopter and driving out of county to pick up or drop off the scout from Miami International Airport.

Once the location scout provides the production company with his/her photographs a second and possible third scout may evolve consisting of the producer, director, art director and location manager. Again, the Film Liaison provides escort and possibly transportation for the scout. Efforts made by the Film Commission and local businesses during these scouts may strongly effect the outcome of a location decision.

Location Shoots

When a film, television or still shoot client decides to shoot on location in the Florida Keys, the Film Commission office provides continued assistance dependent upon the need of the company. This assistance may include assistance with permitting, facilitation of discussions and meetings with government officials, law officers, owners or managers of businesses and properties. This office then assists in locating crew to work on the project, establishing contacts for specific equipment or props, hotel room and restaurant possibilities and a myriad of requests that are unforeseen.

The Film Commission office also provides information and assistance to the hotel/motels, crew and property owners in the Keys if they have questions or concerns regarding the shoot. Information is provided as to what to expect and what to ask for from a production using their property.

The Film Liaison intends to facilitate a successful experience for both the production company, local crew and businesses.

Public Relations Opportunities

The Film Liaison will continue to work with Stuart Newman Associates and industry publications and publicists for production companies to identify PR opportunities in print and broadcast media for the Florida Keys & Key West.

Measurability

A 'Heads in Beds' report will continue to be submitted as part of the TDC meetings report. This accounts for productions who have utilized the film commission and/or shoot on public property and stay in the Florida Keys.

A year end economic impact report based on numbers from the production companies is to be submitted to the TDC. This includes revenue generated in county, room nights booked, production days and locals hired

A break down of which production companies have utilized the Florida Keys as a location is submitted as part of the TDC reports.

Budget FY 2006

Film Industry Trade Shows

Film Florida quarterly meetings

New York Mission

Locations Expo

Film Florida Conference

Broadcast Production Show

Marketing Missions

Registration and Show Expenses

\$6,000

Travel Expenses

Air Fare, Hotels, Meals, In-county mileage

\$7,900

Dues and Fees

Association of Film Commissioners International

\$700

Film Florida

\$1,500

Communications

postage, phone, FAX, cell phone, pager, e-mail,

800 incoming calls

\$5,000

Support materials

film and processing, office supplies, promotional materials

\$7,500

vehicle rentals - boat/helicopter and auto rental for

location scouts and escorting location shoots

Trade publication subscriptions

\$400

Production of industry support material

Florida Keys & Key West Production Guide, Production Guide

mailing expenses, WEB site maintenance, database and

mailing support, postcards

\$13,000

Support equipment

computer programs, etc.

\$4,600

E & P for Production Executives

\$3,000

Student intern/location photographer

\$5,000

Advertising

\$12,400

Resources

\$8,000

Total

\$75,000

M. MARKET RESEARCH

PURPOSE:

The most successful marketing strategies are those developed through a systematic process fueled by research. Market Research is the use of scientific methods to identify and define marketing opportunities and challenges; generate, refine, and evaluate marketing actions; monitor marketing performance; and improve our understanding of marketing as a process. Market Research needs to be carried out regularly because of the constantly changing environment in which we operate, due to shifts in consumer tastes, technological advances, and changes in economic conditions.

The TDC Market Research department designs and conducts research initiatives focused on tourism in the Florida Keys, which are then interpreted and presented within the context of wider industry trends. Ongoing projects are designed to monitor and reveal shifts in demographics, psychographics, and consumer behavior/motivation among both potential visitors and actual visitors to the Florida Keys & Key West. The purpose of the TDC's Market Research department is to maximize the quality, value, effectiveness and application of research in the development of marketing strategies and in measuring the extent to which marketing goals have been met.

OBJECTIVES:

The objectives of the Market Research program are:

1. To identify accurate, ready, cost-efficient sources of information regarding travel and tourism trends, consumer motivation, and economic indicators in order to advance the development of successful marketing strategies.
2. To continuously gather and track information in order to inform the development and execution of the marketing plan and any ad-hoc shifts in marketing strategy (e.g. September 11th, War in Iraq, 2004 Hurricane Season, etc.).
3. To conduct ongoing primary data collection studies of visitors to the Florida Keys & Key West, as well as potential visitors, including web site visitors and 800-number callers.
4. To evaluate and measure the attainment of overall marketing goals and strategic objectives.
5. To coordinate with other departments, the agencies, and the public and private sectors in the provision and use of applied, actionable research to inform the decision-making process and measure effectiveness.
6. To further the understanding and utilization of emerging technologies in the field of market research and strategic marketing.

GOALS:

The goals of the Market Research program are:

1. To expand the use of web-based surveys and research techniques in order to increase our understanding of the role of the internet in Florida Keys & Key West visitor travel planning.
2. To create an internet based visitor report to compare behavior across market segments.
3. To expand the use of the VIS monitoring program to encapsulate a greater visitor response and improve the performance of visitor information services.
4. To increase response levels in local industry research projects in order to enhance district specific reports.
5. To increase the scope and methods of data collection in tracking the effectiveness of advertising, sales, public relations, film, and visitor information services.
6. To develop a study of emerging inbound markets and examine the special considerations for marketing to those traveler segments.
7. To develop a study of repeat visitation in order to increase understanding of visitor motivation to return, or not return, to the destination and examine any correlations to visitor satisfaction.
8. To develop a 10 year update of the 1996 comprehensive study of Florida Keys and Key West visitors through a partnership with NOAA, examining shifts in visitor profiles.

RESEARCH METHODS:

Every research study begins with the identification and formulation of a research question. Once this has been established, the potential sources of information available to answer the question are identified. A research design is then developed. Research designs may be either quantitative or qualitative in nature. Elements of both designs may also be used together in mixed-methods studies to provide more information than could be obtained from using either one alone.

Quantitative Analysis:

Quantitative research focuses on numbers, logic, and the objective, providing quantifiable responses to a specific question obtained from a statistical sampling of a target population. While quantitative data collection techniques can vary depending on the sampling design and the type of information to be collected, the traditional empirical quantitative technique in market research is the survey questionnaire. By administering a survey to a random sample of a population, one is able to draw inferences about the behavior of an entire population.

Survey instruments can include a record sheet for observations, a self-completion questionnaire, or a questionnaire administered by an interviewer. The medium by which the survey is implemented can include mail, telephone, face-to-face interviews, e-mail and the web.

Following the collection of data through the survey instrument, the data are coded and entered into a data file for tabulation and analysis. Resulting summary tables and graphs are the basis for the final report, which outlines the methodology, details the answer to the research question(s), and prescribes conclusions and recommendations.

Qualitative Analysis:

Qualitative research deals in words, images, and tends to be more exploratory and less structured than quantitative research. Qualitative research includes focus groups, in-depth interviews, and observational techniques such as the mystery shopper. While the results of focus groups reflect only a very small segment of the target market, their results offer a far more in-depth understanding of the target's perspectives or opinions than is otherwise obtainable through surveys. With qualitative research, the intent is to provide an understanding of perceptions, feelings, attitudes and motivations.

Market segmentation, the process of breaking the total travel market into smaller, more uniform groups, is one of the basic principles of tourism development and marketing. It recognizes that both business and pleasure travel markets have separate segments, each with a unique set of needs and preferences. By defining markets into segments one can better understand whom, when, how, and why people travel to the Florida Keys & Key West.

In order to be successful in reaching these target markets, we must not only focus on the needs and preferences for each group, but also what motivates these individuals to engage in travel in the first place. The key to understanding travelers' motivations is to see travel as a satisfier of need and wants. Once we understand our visitors needs and wants we will be better prepared to satisfy them.

IMPLEMENTATION:

Research focusing on potential visitors (inquirers) to the Florida Keys & Key West.

Telephone inquiries will continue to be tracked through the VIS software, with monthly and annual reports summarizing the origin of the inquirer (state, country, top cities and states), the advertising source (magazines, newspapers, TV, Internet, etc.), as well as interests, month of arrival, mode of transportation, length of stay, and number in party. Reports will continue to be produced for each District and the County overall. The software and report functions will be maintained and upgraded as needed. Call count reports will enable tracking of monthly and annual variations in VIS call volume to aid operational management. We will increase visitor response by enhancing the VIS system to capture inquires not resulting in mail fulfillment. We will continue to report on the wealth of data gleaned from the Key West Business Guild's Gay and Lesbian VIS database. We will partner with floridakeys.com to enhance the visitor surveys delivered via our web site. We will use the data collected via the online surveys to develop a web visitor focused VIS report.

Research focusing on actual visitors to the Florida Keys & Key West.

Intercept interviews with visitors to the Florida Keys & Key West continue to be the cornerstone of our research efforts with respect to actual visitors. The Visitor Profile Survey will continue to gather demographic, expenditure, activity, satisfaction, and trip planning data from visitors to the Keys. 'Special topic' questions will be added on an as-needed basis. We will continue to track prior cruise ship visitation in District 1 in order to measure potential for conversion into overnight visits. The data collection will continue to be conducted by an outside research firm, with the data analysis and reporting performed in-house. We will further develop market segmentation studies of both actual and potential Florida Keys visitors based on interests including soft adventure, cultural, weddings, and family travel.

We will partner with NOAA, the National Oceanic and Atmospheric Administration, to conduct a 10 year update of the 1996 NOAA led Florida Keys and Key West visitor study. The study provided a more comprehensive visitor profile and examined the economic contribution of recreating visitors. We will further develop our understanding of our visitor behavior and their motivation to return, or not return, to the destination through a study on visitor satisfaction.

Program effectiveness research initiatives planned for the upcoming year include the annual 'Sales' survey of Florida Keys properties, which gathers detailed information regarding the composition of their business in order to inform the marketing plan and evaluate the efficacy of our sales efforts. We will continue to track advertising effectiveness incorporating our investigation in various research projects. For example, during our visitor surveys we probe advertising recall, both general media type and specific media sources. We also monitor trends in origin of visitor inquiries following media campaigns in given areas. In addition, regular monitoring of VIS program performance in the form of 'Mystery Shopper' calls will be conducted on the Chambers of Commerce and the Key West Business Guild to evaluate the quality of services being provided to our 800-number callers.

We will continue to monitor shifts in travel market segments, examining the implications for our marketing strategy. Rapid economic growth in nations such as Russia, China and Poland has resulted in an increase within their population of those with the means to travel. Emerging markets, such as these nations, are increasing travel to the United States at a much higher percentage than traditional international markets. We will conduct a study of emerging inbound markets focusing on political conditions that effect travel, the traveler profile, their culture and strategies for marketing to the traveler.

Smith Travel Research data will continue to be utilized on an ongoing basis in order to gauge lodging industry performance. This includes the following: a monthly occupancy and average daily rate report for Monroe County, Key West, and Monroe County excluding Key West overall and by price tier; and weekly reports on daily occupancy and average daily rates for Monroe County and Key West. These weekly reports not only provide a useful means by which to assess the impact of special events and lodging performance over holiday periods but also provide us with quick turnaround of lodging data than we currently see under the monthly schedule. We will maintain our efforts to increase sample size so that further segmentation of the data can be implemented.

Our research partnership with VISIT FLORIDA will continue, as this cooperative relationship has been essential to keeping our research on the cutting edge. This partnership not only enables us to obtain timely data pertaining to consumer travel intentions, forecasting, and regional industry performance but also provides an opportunity to participate in research initiatives we would not otherwise be able to afford on our own. Further, we will continue to network with other research organizations, including participating in the VISIT FLORIDA monitored research listserve, to increase our knowledge of, and exposure to, research techniques throughout the industry.

We will continue to strengthen the presence of the market research department by attending and presenting at local industry events such as the Florida Keys Lodging Association functions. With feedback from local stakeholder groups, we will make every effort to design creative, user-friendly data collection methodologies with the aim of increasing sample size and industry participation.

Various other resources such as travel industry and market research journals, newsletters, and web sites will be regularly monitored to assist with anticipating tourism trends. Forecast data will be reviewed for economic and travel behavior information that can be applied to the data we collect at the local level. The department will compile its regular 'Economic Indicators Report', which provides a summary of economic and travel industry trends at the national, state, and local levels. We also plan to further integrate economic trend data into the market research initiatives which emerge from this office.

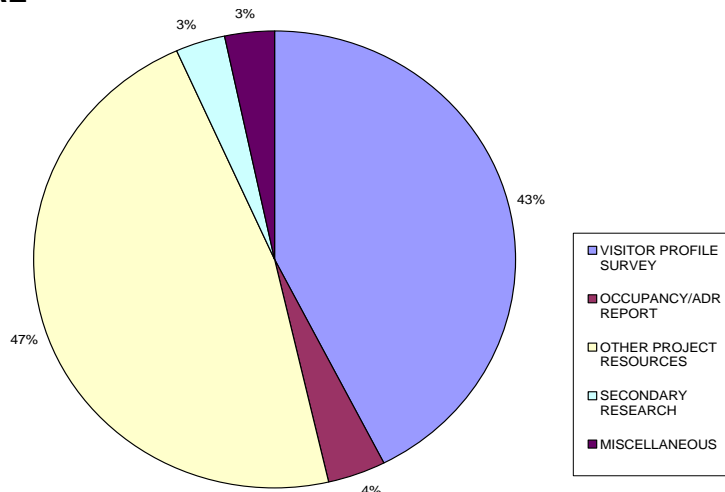
MEASURABILITY:

The above outlined Market Research projects will include stated objectives, outlined in the form of a research question, the information expected to be obtained by the project, and the budget, if any, for the study. Each project will be evaluated after completion to determine if the stated objectives were met, and to assess the value of the information collected.

Additionally, the Market Research department will provide the means for evaluating the goals and objectives of other departments and the agencies.

MARKET RESEARCH BUDGET

VISITOR PROFILE SURVEY	\$68,100
OCCUPANCY & AVERAGE DAILY RATE REPORT	\$8,100
PROJECT RESOURCES	\$75,200
Web Site Visitor Survey	
Emerging Inbound Markets Study	
Repeat Visitation Patterns Study	
Market Segmentation Studies	
Focus Group Research	
Sales Effectiveness Research	
Traveler Motivation Research	
Mystery Shopper Surveys	
VIS Software Enhancements	
Other Project Resources	
SECONDARY RESEARCH	\$5,200
Purchase of Secondary Research from Outside Sources	
MISCELLANEOUS	\$5,500
Memberships	
Telephone, Fax, Modem	
Postage	
Computer Equipment/ Software Upgrades	
Conference, Workshop, Seminar Attendance	
Data Entry Assistance	
TOTAL	\$162,100



Section Four: Evaluation

The final area of a marketing plan consists of assessing the effectiveness of the programs. The TDC must continuously monitor its marketing plan to ensure that it is accomplishing what it was intended to do. Goals should be established to serve as benchmarks for assessing the plan's effectiveness.

Based on a regular evaluation of these benchmarks, adjustments are inevitable in order to redirect marketing efforts towards the highest level of performance.

Though the TDC has different ways of tracking our marketing and sales efforts, there are several common measurement factors used in assessing the level of a program's performance. The TDC Market Research Department regularly conducts visitor profile analysis and monitors marketing effectiveness through call and website reports and revenue reports. Research strategies also utilize lodging data and visitor profile data.

In the marketing strategies, methods and implementation sections of the marketing plan, each area (advertising, sales, public relations, film commission) includes specialized evaluation criteria to measure performance. Accountability assessment is the sound measurement of the extent to which stated goals of a specific marketing effort are being or will be achieved.

Accountability assessment not only measures performance, but also enables review of the adequacy of our goals and provides us with guidance as to how future marketing performance can be maximized. Having the ability to make quick adjustments in our marketing is also an important element of our program. Being able to gather and analyze data in a timely manner gives us the ability to make changes in our plan.

We are making every attempt to develop an orderly planning process which includes a clear statement of goals to be attained in the time frame outlined. Those goals are reached through a series of marketing strategies and methods, each of which can and should be measured. The measurement techniques should be designed objectively, without preconceived notions of the results and without a design which attempts to prove something works. Such methods include:

- Pre/post tracking studies, which measure users and non-users of our marketing efforts. Why someone did not respond is as important as why someone did.
- Comprehensive studies of how travel information is delivered and used by the potential visitor. What is the role of technology in the travel planning process?
- The measures of economic impact and return on investment (ROI). What are the total benefits of a visitor coming to our area versus the cost of attaining those benefits?
- Qualitative analysis to learn what works in marketing our area, both in the short and long term. Our assessment of this year's plan should not only grade our current efforts but should help show us how to make adjustments, and be more effective in subsequent years.

Some of the criteria or techniques that will be used or planned by the TDC this year to assess program effectiveness include:

- VIS reports
- Visitor Profile Survey reports
- Occupancy and average daily rate reports
- Focus group studies
- Conversion studies
- Economic & tourism indicators
- Bell South call reports
- Bed tax revenues report
- Sales tax revenues report
- US 1 traffic counts
- Airport arrivals and cruiseship passenger counts
- Ground transportation(Greyhound, shuttles) reports
- Magazine reader response cards
- Internet request reports
- Internet marketing click-through counts
- Web site visits reports
- Web site brochure and video downloads
- Electronic sales lead tracking
- Travel agent sales reports
- Number of meetings booked
- Follow-up sales leads reports
- Credit card demographics
- European agencies' reports
- VIS mystery shopper reports
- Competitive data from other destinations

In summary, we need to know what marketing efforts are working; what is not; and make the appropriate adjustments in the quickest period of time, to ensure the success of our decision-making process.